

# Pecyn Dogfennau Cyhoeddus



Mae'r adroddiadau canlynol yn Eitemau Gwybodaeth ar gyfer y Pwyllgor Craffu Addysg.

- 1 Trefniadau Derbyn i Ysgolion ar gyfer Blwyddyn Academaidd 2024-25
- 2 Monitro'r Gyllideb 2022/23 (Cyfnod 9)



## **EDUCATION SCRUTINY COMMITTEE**

**SUBJECT: SCHOOL ADMISSIONS ARRANGEMENTS FOR THE  
ACADEMIC YEAR 2024-25**

**REPORT BY: EMMA STRATHDEE**

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

- 1.1 This report is to inform members of the agreed Admission Arrangements for the academic year 2024-25.

### **2. SUMMARY**

- 2.1 In line with the School Admissions Code 2013, the local authority is required to consult with Headteachers, Governing Bodies and neighbouring Admission Authorities on their proposed Admission Arrangements. The consultation period ended on 24<sup>th</sup> February 2023. There were no objections to the proposed arrangements and as such, these arrangements are now approved.

### **3. RECOMMENDATIONS**

- 3.1 The proposed Admission Arrangements 2024-25 are shared with Scrutiny Members for information.

### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 To ensure that Scrutiny Members are informed of the Admission Arrangements for the academic year 2024-25.

### **5. THE REPORT**

- 5.1 The Admission Arrangements are shared with Scrutiny Members annually. There are no changes to the Admission Arrangements for the academic year 2024-25.

## 5.2 **Conclusion**

The report is shared for information.

## 6. **ASSUMPTIONS**

6.1 There are no assumptions in this report.

## 7. **SUMMARY OF INTEGRATED IMPACT ASSESSMENT**

7.1 An integrated Impact Assessment is not required for this information item.

## 8. **FINANCIAL IMPLICATIONS**

8.1 None

## 9. **PERSONNEL IMPLICATIONS**

9.1 None

## 10. **CONSULTATIONS**

10.1 The Admission Forum meets annually to review all Admission Arrangements and procedures. Other consultees are outlined below.

## 11. **STATUTORY POWER**

11.1 The School Admissions Code 2013 and The School Appeals Code 2013.

Author: Emma Strathdee, Manager School Admissions, Customer Services/Complaints and Administration.

Consultees: Headteachers  
Chairs of Governors  
Neighbouring local authorities  
Admission Forum

Background Papers:  
Appendix 1 – Admission Arrangements 2024-25



# Admission Arrangements 2024-25

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## Primary & Secondary Education Admission & Transfer Arrangements

In line with the School Standards and Framework Act 1998, subsequent legislative updates and Welsh Governments (WGs) Schools Admissions Code, these admission arrangements will aim to ensure that:

Parent's preference for the schools of their choice is considered in the context of a legislative framework, which has regard to the provision of efficient education and the efficient use of resources.

Admissions criteria are clear, fair and objective, for the benefit of all children including children with special educational needs or with disabilities.

Local admission arrangements contribute to improving standards.

The Local Authority (LA) consults with neighbouring Admission authorities and co-ordinates arrangements, including the rapid reintegration wherever reasonable of children who have been excluded from other schools.

Parents have easy access to helpful admissions information.

The LA's admission arrangements seek to achieve full compliance with all relevant legislation and guidance, including legislation on infant class sizes and equal opportunities (Equalities Act 2010, the Human Rights Act 1998 and the Welsh Language Act 1993) and take full account of the guidance in the Code issued by the Welsh Government.

The Equality Act 2010 and Caerphilly County Borough Council's (CCBC) Strategic Equality Scheme emphasises the legal general duty the Council and its partners have to:-

Eliminate unlawful discrimination.

Promote equal opportunities.

Promote good relations and mutual respect.

This Council will work actively against discrimination and seek to create equal access to its services for all, irrespective of ethnic origin, sex, age, marital status, sexual orientation, disability, gender reassignment, religious beliefs or non-belief, language, nationality, responsibility for any dependents or any other reason which cannot be shown to be justified.

### 1.1 Choosing a School

The entry of children to schools is controlled and administered by an 'Admissions Authority'. In the case of Community Schools, this is the Caerphilly County Borough Council (the LA). In the case of the one Voluntary Aided School (St. Helen's Roman Catholic Primary School) the Admissions Authority is the Governing Body of the school. Within the County Borough, each school has an area that it traditionally serves called the "catchment area". In line with legislation, LAs must allow all parents the opportunity to express a preference for the school they wish their child to attend.

*Pupils who reside within a defined catchment area of a school do not have an automatic right to attend that school. An online application must be made, and the placements will be allocated in accordance with the LA's admissions procedure.*

Parents may exercise their right to express a preference at the following times:

- On admission to an infant school or the infant department of a primary school.
- On transfer from infant to junior school or infant school to junior department of a primary school.
- On transfer from junior or primary to secondary school.
- When parents wish to transfer their child from one school to another.

Parents may also express a preference for their child to attend a Voluntary Aided School.

The LA (in the case of Community Schools) and School Governing Body (in the case of Voluntary Aided) must comply with any preference, which is expressed, provided there is room within the school. However, the decision to admit pupils, must take account of:

- the overall provision of efficient education and efficient use of resources.
- whether it is a co-educational or single sex school.
- Section 87 of the School Standards and Framework Act 1998 (and subsequent legislative updates and WGs Schools Admissions Code), which also allows an admission authority to refuse to comply with parental preference for a period of two years following a second or subsequent exclusion.
- where to admit would be incompatible with the duty to meet Infant class size limit of 30 because the admission would require measures to be taken to comply with those limits which would cause prejudice to efficient education or efficient use of resources.

The local catchment areas for schools providing primary education are normally grouped together to form a linked catchment area for each maintained secondary school (see section 2.32).

*Admission or attendance of pupils at the feeder junior/primary school does not provide automatic entry to the chosen secondary school. All parents are required to complete admission forms at the appropriate time.*

All schools within the LA aim to provide their pupils with an educational opportunity, which is best suited to each individual child. Some pupils will, however, have learning needs requiring special educational provision. In some instances, parents will already be receiving specialist support and guidance regarding the choice of school for their child.

All parents, however, are encouraged to discuss possible areas of concern with their local Headteacher who may then seek specialist advice.

All of the above arrangements apply equally to Welsh Medium schools within the Authority. Admission to Welsh medium primary schools is not dependent upon the parents or pupils being fluent Welsh speakers. There are currently 11 Welsh medium primary schools within the LA whose catchment areas cover the entire LA's boundary and are not restricted to the catchment areas of the local English medium school.

Ysgol Gyfun Cwm Rhymni will provide Welsh medium secondary education to all CCBC resident pupils, subject to parental preference.

### Welsh Medium Schools

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### 1.2 Admission Limit

All maintained schools will admit pupils up to their admissions number. A child will normally be offered admission to the school of the parents' preference unless applications exceed the admission number, when this occurs all applications for that school will be assessed against the oversubscription criteria.

The normal ages for admission to CCBC schools are:

- Age 3/4 in Nursery;
- Age 4/5 in Infant and Primary Schools;
- Age 7/8 in Junior Schools;
- Age 11/12 in Secondary Schools.

*You will need to submit an online application at each of the above stages.*

Where you submit an application for your child to attend Reception at a Primary School, an application will not be required for them to attend the Junior phase. Likewise, if you submit an application for your child to attend Reception at Idris Davies 3 to 18 School, you will not need to submit an application for the Junior or Secondary phase.

The LA's policy is to provide all 3 to 4 year old children in the Caerphilly County Borough an entitlement to a funded part-time nursery place at their local infant or primary school.



### 1.3 Oversubscription Criteria

(these apply to all admissions to oversubscribed schools)

1. Looked After Children (children in public care) and those who were previously Looked After Children.
2. Those children who live in the school's catchment area on or before the published closing date.  
*Note: Those children who live within the school's catchment area and have a sibling\* already attending the school will be admitted first (the sibling must be of statutory school age), and then those children who live within the school's catchment without a sibling will be admitted.*
3. Children with siblings\* living in the same household attending the school in September 2024. The sibling must be of statutory school age.
4. After taking account of the above categories, priority will be based on the closeness to the school measured automatically by the LA's G.I.S (Geographical Information System).

Distance is measured from the grid reference of the property to the grid reference of the school (as recorded in the GIS system). *If the LA has the situation where any home addresses calculate the same distance, then a trundle wheel will be used to establish the nearest address.*

*\*A sibling is a child who is the brother/sister, half-brother/sister (children who share one common parent), step-brother/sister where two children are related by marriage. This definition also includes adopted or fostered children living at the same address.*

### 1.4 Addresses

When considering whether a child lives in a school's catchment area, the address considered is that of the parent or legal guardian, irrespective of a family's domestic arrangements. i.e. the address of another relative or childminder etc. must not be given. In certain cases, it may be necessary to provide evidence relating to the child(ren) in question, to show the home address of the child(ren).

Where parents have shared responsibility for a child, and the child lives with both parents for part of the week then the home address will be determined as the address where a child lives for the majority of the week (e.g. 3 out of the 5 school days). In such circumstances, the home address to which the Child Benefit is paid will be used. Parents will be required to provide documentary evidence to support the address they wish to be considered for allocation purposes.

### 1.5 Multiple Birth Children (e.g. twins or triplets).

If when applying the oversubscription criteria, the last child to be admitted is one of a multiple birth e.g. twin or triplet then the LA will also admit the other sibling(s).

### 1.6 Children of UK Service Personnel

Children of UK service personnel will be treated as in catchment if their application form is accompanied by an official Ministry of Defence (MOD) letter declaring a definite return date and confirmation of the new address. Pupils from outside the school's catchment area will be admitted in accordance with parental

preference if the Admission Number of the school, class or unit has not been reached and, if selection is necessary, the criteria shown above will be used.

### 1.7 Children with a Statement of Special Educational Needs or an Individual Development Plan

The Local Authority is required by the Education Act 1996 to admit to the school a child with a Statement of Special Educational Needs that names the school and from 1 September 2021, section 48 of the 2018 Additional Learning Needs and Education Tribunal (Wales) Act requires the governing body of a maintained school in Wales to admit a child to the school if the school is named in the child's individual development plan for the purpose of that section, which is to secure the child's admission to the school. This duty applies despite the limits on infant class sizes and even if admitting the child would result in the school exceeding its admission number. The duty to admit applies at all times, including where a school is named in a plan outside the normal admission round.

### 1.8 Waiting Lists

Following the allocation of places during the normal admission round any pupil that is refused admission to an oversubscribed school will remain on a waiting list for placement until the 30th September of that school year and, should a placement become available, the placement will be allocated in line with the authority's oversubscription criteria. After the 30th September parents will need to make a new application for admission to their preferred school.

## 2.1 Primary Education

Every child is required by law to receive full time education from the beginning of the school term after his/her fifth birthday. In CCBC, however, all children are able to start school full time at the beginning of the school year (September) in which they become five i.e. between the 1st September and the 31st August. Parents are able to defer the start of a child until the term following their fifth birthday.

All children are able to attend school on a part time basis in the September following their third birthday. Children between the ages of 3/4-11 are recognised as pupils receiving primary education. In Caerphilly County Borough, primary education is provided either in separate infant or junior schools, or in primary schools with one complete 3/4-11 age range.

## 2.2 Reduction of Infant Class Sizes

Choosing a school for the first time for a young child is especially important, both for parents and for children themselves. In accordance, with Infant Class Size Legislation, infant classes at a maintained school should contain no more than 30 pupils where a teaching session is managed by a single qualified teacher (or where the session is managed by more than one qualified teacher, no more than 30 pupils for every teacher).

## 2.3 Admission to an Early Years Placement at a Nursery School

Children born between the 1st September and the 31st March maybe entitled to an Early Years placement (term after their 3rd birthday) at their local Primary/Infant school dependent on availability.

Where a school has reached their Admission Number in their current nursery and where the in-catchment pupils exceed 70%, only pupils who reside within the schools catchment area will be admitted into an Early Years placement.

*Admission into an Early Years place in either the Spring or Summer term does not entitle your child to continue education in the nursery year at the school. An application for admission into the nursery year at the school will need to be made at the relevant time.*

## 2.4 Admission to Nursery School

The number of places available in a nursery year is set by the LA and the decision whether to admit your child will be taken in accordance with the LA's guidelines.

*Pupils who are admitted to a nursery year, will not have an "automatic" right to continued education within that school. A formal application must be made for entry into the reception year at the appropriate time.*

## 2.5 Admission to Infant Schools or Infant Department within Primary Schools

Pupils who attain the age of five during the school year may be admitted to an infant school/department, at the commencement of the school year in September. Pupils admitted to a separate infant school will not have an 'automatic' right to continued education at the feeder Junior School which serves the same catchment area. Whilst every effort will be made to accommodate such pupils, a formal application must be made for transfer to the Junior school at the appropriate time.

## 2.6 Transfer to Junior Schools

Children enter or transfer to a Junior School on the first day of the Autumn term following their seventh birthday. In Primary Schools the infant and junior sections are simply departments of the same school and children progress through the school from the infants to juniors without having to transfer elsewhere.

Whilst every effort will be made to accommodate such pupils, a formal application must be made for transfer to the Junior school at the appropriate time.

## 2.7 Changing Schools: Primary Education

Changing schools during primary education is a significant step for your child to take. In the case of moving the family home, such a decision may well be a necessity and you will need to contact your local school or the Directorate of Education and Corporate Services for assistance. If, however, you would like your child to transfer from one school to another, please contact the Headteacher of your child's current school first. Should you still wish to proceed with these transfer arrangements; you can apply at <https://caerphilly.gov.uk/schooladmissions>

If there is a suitable vacancy, your child will be admitted to the school. Parents should note, however, that classes may include more than one age group and the Headteacher will have the task of locating your child in the most appropriate class.

## 2.8 Admission to Secondary Schools

Children normally transfer from primary school to secondary school at the beginning of the school year following their eleventh birthday. If your child was born between 1st September 2012 and 31st August 2013, she/he will transfer to secondary school in September 2024. Headteachers of primary schools will be able to inform parents of the secondary school which their children should normally attend. It should be noted that the home address denotes which school is the 'catchment' school and not the primary school attended. Whilst every effort will be made to accommodate pupils, an application must be made for transfer to secondary schools at the appropriate time.

## 2.9 Changing Secondary School

Changing secondary schools is a significant step for your child to take. In the case of moving the family home, such a decision may well be a necessity and you will need to contact your local school or the Directorate of Education and Corporate Services for assistance. If however, you would like your child to transfer from one secondary school to another, please contact your present Headteacher first. Should you still wish to proceed with these transfer arrangements; you must contact the Directorate of Education and Corporate Services for advice in making your application, which will then be required in writing. In considering your request for transfer, the LA will review the number of pupils in the year group relevant to your child. If the child is in years 10 or 11, the range of subject options chosen may also be a factor. If that particular year has not reached the school's admissions number, then your child will be admitted to the school. Parents should note, however, that curriculum option choices may vary from school to school.

## 2.10 Applying for a Place

When you apply for a place at a particular school, you must complete the relevant application form online at <https://www.caerphilly.gov.uk/schooladmissions>

You must apply by the closing dates shown below for admission in September 2024.

If you require assistance with completing the form, please contact the school admissions team on 01443 864870.

The LA will inform you whether, or not it is possible for your child to attend your preferred school. Each school produces a prospectus, which contains relevant information including school aims and educational beliefs, the organization of the school and curriculum opportunities, including out of school activities. This school prospectus is available from the Headteacher.

## 2.11 Late Applications

Any applications that are received after the closing date for admission will be refused if the school is oversubscribed unless the family has just moved into the catchment area and the application is received before the offer of places are made. If the application is received after the places have been offered and documented evidence is provided to demonstrate that the family have moved into the catchment area of the school the pupil will be given higher priority on the waiting list. Places will then be allocated using the authority's oversubscription criteria.

## 2.12 Withdrawing Offers of Places

The offer of a school place will be withdrawn on the basis of a fraudulent or intentionally misleading application being received (e.g. falsely claiming to reside within a catchment area of a school).

## 2.13 Sixth Form Admissions

The admission of Sixth Form pupils to Community Schools is determined by individual schools. Therefore, applications should be made directly to the school.

## 2.14 Timetable for admissions to schools September 2024

### Admission to Secondary School

|                                  |                                |
|----------------------------------|--------------------------------|
| Admission Forms available online | 1 <sup>st</sup> September 2023 |
| Forms returned to LA             | 27 <sup>th</sup> October 2023  |
| Parents notified of outcome      | 1 <sup>st</sup> March 2024     |

### Admission to Primary School

|                                  |                                |
|----------------------------------|--------------------------------|
| Admission Forms available online | 1 <sup>st</sup> September 2023 |
| Forms returned to LA             | 15 <sup>th</sup> December 2023 |
| Parents notified of outcome      | 16 <sup>th</sup> April 2024    |

### Admission to Nursery

|                                  |                                |
|----------------------------------|--------------------------------|
| Admission Forms available online | 1 <sup>st</sup> September 2023 |
| Forms returned to LA             | 23 <sup>rd</sup> February 2024 |
| Parents notified of outcome      | End of May 2024                |

### 2.15 What Happens if your Child is Refused a Place?

In the vast majority of cases children are offered places at their parents' first choice of school. If, however, your child is unable to gain admission, you will need to decide whether you are willing to accept a place offered at a different school, or whether you wish to continue with your first application. If you choose the latter course, you may appeal to an Independent Appeal Panel. This Independent Appeal Panel will judge whether the school is full and, should that be the case, whether the parent's application is so strong that the child should still be offered a place.

*It should be noted that there is no right of appeal for Nursery places..*

### 2.16 Registering your Appeal

You may make a formal appeal against the LA's decision, but this must be received within 28 calendar days of you being notified of the decision not to admit your child to your chosen school. You should forward this appeal in writing, to the Directorate of Education and Corporate Services. The LA will refer the appeal to the Council's Legal Department who will arrange for the appeal to be heard by an Independent Appeal Panel and will set a time and place for the hearing. The Panel will afford parents an opportunity of appearing and making their representations (oral and/or written). Parents are able to seek admission to an alternative school whilst they are pursuing an appeal.

Parents, however, are advised that: -

- They may elect not to attend the appeal meeting and, instead, allow the appeal to be considered on a written statement.
- The outcome of the appeal will be decided on the information available.
- They will be given at least fourteen days (from the date of posting) written notice of the meeting of the Appeal Hearing.
- They are welcome to be accompanied by a friend, or represented by a solicitor, but that, in the latter case, the Directorate of Education and Corporate Services should be informed at least seven days before the hearing.
- A separate Appeal Panel hears appeals against decisions of the Governing Body of a Voluntary Aided or Foundation School. Guidance on such an appeal should, therefore, be sought from the school concerned.
- Please note that limitations will be placed on the powers of the appeal panel to allow appeals against the refusal to admit a child to a school where infant class size legislation applies.
- The LA will not consider a second appeal application unless there is a significant change in circumstances (which will need to be evidenced).

### 2.17 Disability Discrimination

The Council has in place an Accessibility Strategy, which details how the Council will meet its duties under the Equality Act 2010 and preceding Disability Discrimination legislation.

The Strategy covers access to premises for staff, visitors and pupils. The strategy contains the Council's plans to improve physical access to school premises across the borough to minimise the barriers to disabled pupils accessing education. In a number of cases, due to the topography of a school site, it may

not be deemed accessible for a child with a physical disability. In such cases parents/guardians will be provided with the details of the nearest accessible school which is able to meet the child's needs.

Admissions forms are screened by Education in order to highlight any children with medical condition/physical disability. Parents will be contacted at the earliest opportunity to discuss the child's needs and a suitable school placement will be considered. The School and Officers of the Council work closely with parents to ensure that detailed assessments are in place to support the inclusion of pupils, where possible within their chosen school.

### 2.18 Usage of Accommodation

The LA continually reviews the usage of accommodation at all Infant, Junior and Primary schools and subsequently updates the Capacity and Admission Number to reflect this review. Allocation of placement will be carried out using the Authority's published admission arrangements.

### 2.19 Admission Forum

In line with The Education (Admission Forums) (Wales) Regulations 2003 the Authority has established an Admission Forum which will enable us to bring together admission authorities and others with an involvement in school admissions within the area.

### 2.20 Welsh Language Policy

In accordance with the Welsh Government's Welsh-medium Education Strategy (April 2010), the LA's policy is that every child should have the opportunity to learn and use the Welsh language effectively. Currently provision is made for this in the following ways, in line with the LA Welsh in Education Strategic Plan.

Education is available at Welsh Medium Primary Schools to all pupils whose parents select that medium of education. Although the main medium of instruction is Welsh, pupils in Key Stage 2 also study the National Curriculum programmes of study for English to the appropriate level.

Pupils will be able to continue their education at a Welsh Medium Comprehensive School.

### 2.21 The teaching of Welsh as a second language in English Medium Schools.

In the foundation Phase Welsh is taught to all pupils. The emphasis is on using the language with purpose and in meaningful situations. In addition, the incidental use of the language during the school day is encouraged.

At Key Stage 2, the language is further developed orally and more attention is given to teaching, reading and writing skills.

At Key Stages 3 and 4 Welsh is taught to all pupils. Opportunities are provided in all schools for pupils to continue their studies for both the 16+ and "A" level examinations.



## **EDUCATION SCRUTINY COMMITTEE**

**SUBJECT: BUDGET MONITORING 2022/23 (PERIOD 9)**

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

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

1.1 To inform Members of the projected 2022-23 outturn position for the Directorate of Education based on the most recent information available.

### **2. SUMMARY**

2.1 The report identifies projected under / (overspends) currently forecast for 2022-23 (full details attached in Appendix 1).

2.2 In summary the current projected outturn position for Education and Lifelong Learning is an underspend of £1,059k. The projected outturn position for Corporate Services is an underspend of £554k, consequently overall the projected outturn position for Education and Corporate Services is an underspend of £1,613k.

### **3. RECOMMENDATIONS**

3.1 Members are requested to note the contents of this report.

### **4. REASONS FOR THE RECOMMENDATIONS**

4.1 To ensure that Members are fully informed with regards to the 2022-23 projected revenue spends position for Education.

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



## 5. THE REPORT

- 5.1 The report deals with the budget monitoring information for the Education Directorate. The revenue position is summarised in Appendix 1, with a breakdown split across 3 areas, Schools Related, Education Related and Lifelong Learning (LL) related respectively.
- 5.2 The projected outturn position is based on actual income and expenditure details to the end of December 2022, together with data used to forecast income and expenditure. Account is also taken of the outturn position for previous years and information available following discussions with Managers.
- 5.3 A net underspend of £1,059k is currently forecast for Education & Lifelong Learning, details are outlined below. The projected outturn position for Corporate Services is an underspend of £554k, consequently overall the projected outturn position for Education and Corporate Services is currently an underspend of £1,613k.
- 5.4 The significant variances in Education relate to the following:

|                                   | £'000<br>(Under / (Over)) |
|-----------------------------------|---------------------------|
| School Covid Related              | (286)                     |
| Pension Costs School Based Staff  | 333                       |
| Psychological Service             | 105                       |
| Language Support                  | 119                       |
| Vulnerable Learners               | 305                       |
| Early Years Central Team          | 235                       |
| Net Other (Details in Appendix 1) | 248                       |
| <hr/>                             |                           |
| Total                             | 1,059 Underspend          |

- 5.4.1 Until 31<sup>st</sup> March 2022, Schools were able to submit claims to Welsh Government (through the Education Finance Team) against the Covid Hardship Fund Grant to support additional costs linked to Covid-19, in line with Welsh Government guidelines. Since 1<sup>st</sup> April 2022 this funding source has ended for schools, however 2 issues were raised by Headteachers as we transition. One was in relation to the additional mid-day clean in our schools (instigated in the recent 2 years due to Covid-19) and the other was in relation to supply cover costs relating to teaching staff who are 26+ weeks into their pregnancy, with guidance supporting a risk assessment for such staff members to work from home.
- 5.4.2 Following discussions with Headteachers and at a senior level within the Authority, schools were advised that the Authority would continue to support and fund the additional mid-day clean to the end of the summer 2022 term. Schools were also advised that if they wish to continue with this arrangement from September 2022 that this would need to be part of each individual school's financial planning. In July, Headteachers were advised that the guidance relating to the workplace and pregnancy had changed, with regards to the rule of automatically working from home after the 26 weeks. Schools have been issued with appropriate guidance with employers required to adopt an individualised approach to support pregnant workers through the risk assessment process. Consequently, schools have been advised that

the Authority will support supply cover costs for pregnant staff to the end of the summer term and then to the end of the Autumn Term, with each claim for cover costs during the Autumn Term needing to be supported by a risk assessment that supports this arrangement.

- 5.4.3 The current Covid-19 cost projection includes estimates to the end of December relating to supporting pregnancy related cover requirements. As part of the Authority's budget planning for the current financial year its Covid-19 Earmarked Reserve was topped up to £5m. Whilst this is a significant figure further discussions will take place with the Head of Financial Services & S151 Officer around capacity to support this schools related cost from this reserve against other competing pressures within the Authority.
- 5.4.4 The updated position includes a projected underspend in relation to the Authority's on-going liability linked to pension costs for school-based staff. This projection is a little higher than the £255k underspend position in financial year 2021/22. This position needs to be referenced against 2 years of growth against the Individual Schools Budget (ISB) / formula funding, together with additional grant funding to schools from Welsh Government.
- 5.4.5 The variance in relation to the Psychological Service relates to in year staff vacancy gaps. A staff turnover saving target of £50k (for this service) is part of the budget proposals for 2023/24. The proposal is based on experience of staff movement in this area of high demand for professionals. The underspend in relation to our Language Support Team is again linked to in year vacancies.
- 5.4.6 The underspend position with regards to support for our vulnerable learners is a small variance on a budget of £10m. An element of this underspend relates to a delay in the expansion of 2 classrooms at Glan Y Nant (Pupil Referral Unit), which has generated a level of revenue saving in year. The projected outturn position includes a level of estimate for the final 3 months of the financial year, since some costs can be quite significant.
- 5.4.7 The underspend in our Early Years Team is directly linked to staff time supporting the grant funded areas of Flying Start, Early Years Expansion and the Childcare Offer being funded from the grants. As part of the 2023/24 budget proposals a savings target of £100k has been identified against this budget for one year only.
- 5.4.8 It is important to note that the financial projections in this report exclude a forecast outturn position for our schools. It is also important to reference the fact that schools have been supported with budget growth in year (£3.9m) due to the higher than originally estimated pay awards for teaching and non-teaching staff.

## 5.5 **Conclusion**

- 5.5.1 The projected outturn position for Education is currently an underspend in 2022-23 of £1,059k.
- 5.5.2 Full details are contained in the body of this Report.

## **6. ASSUMPTIONS**

- 6.1 The projected outturn position is based on actual income and expenditure details to the end of December 2022, together with data used to forecast future income and expenditure. Account is also taken of the outturn position for previous years and information available following discussions with Managers.

## **7. SUMMARY OF INTEGRATED IMPACT ASSESSMENT**

- 7.1 An IIA is not necessary for this Information Only Report.

## **8. FINANCIAL IMPLICATIONS**

- 8.1 In summary, based on information currently available there is projected revenue underspend for Education of £1,059k.
- 8.2 Overall the current projected outturn position for Education & Corporate Services is an overspend of £k.

## **9. PERSONNEL IMPLICATIONS**

- 9.1 In 2022-23 the Directorate will continue with the strategy of prudent vacancy management.
- 9.2 There are no direct personnel implications arising from this report

## **10. CONSULTATIONS**

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

## **11. STATUTORY POWER**

- 11.1 Local Government Act 1972 and 2000.

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Consultees: Richard Edmunds, Corporate Director, Education and Corporate Services  
Keri Cole, Chief Education Officer  
Sue Richards, Head of Education Planning and Strategy  
Sarah Ellis, Lead for Inclusion and ALN  
Sarah Mutch, Early Years Manager  
Paul Warren, Strategic Lead for School Improvement  
Cllr Carol Andrews, Cabinet Member for Education and Communities  
Cllr Eluned Stenner, Cabinet Member for Finance and Performance  
Cllr Teresa Parry, Chair of Education Scrutiny Committee  
Cllr Jo Rao, Vice Chair of Education Scrutiny Committee

Steve Harris, Head of Financial Services and S151 Officer  
Dave Roberts, Interim Finance Manager  
Mike Lewis, Principal Accountant Education  
Julie Baker, Principal Finance Officer (Schools)  
Nicola Hooper, Senior Accountant Education  
Lynne Donovan, Head of People Services  
Rob Tranter, Head of Legal Services  
Ros Roberts, Business Improvement Officer  
Clive Campbell, Transportation Engineering Manager

Appendices:

Appendix 1 Projected Revenue Outturn Figures 2022-23

| <b>EDUCATION &amp; LIFELONG LEARNING</b>                            | <b>Original Estimate<br/>2022-23<br/>£</b> | <b>Revised Estimate<br/>2022-23<br/>£</b> | <b>Estimated Outturn<br/>2022-23<br/>£</b> | <b>Variance Under<br/>(Over)<br/>2022-23</b> |
|---|--|---|--|--|
| <b><u>SUMMARY</u></b>   |  |   |  |  |
| <b>SCHOOLS RELATED</b>  | 125,260,474                                | 129,391,202                               | 129,284,761                                | 106,441                                      |
| <b>EDUCATION</b>  | 18,361,829                                 | 18,874,980                                | 18,007,383                                 | 867,597                                      |
| <b>LIFELONG LEARNING</b>  | 3,966,606                                  | 4,187,146                                 | 4,101,783                                  | 85,363                                       |
| <b>TOTAL SERVICE EXPENDITURE (Revenue)</b>                          | <b>147,588,909</b>                         | <b>152,453,328</b>                        | <b>151,393,927</b>                         | <b>1,059,401</b>                             |
| <b>HOME TO SCHOOL / COLLEGE TRANSPORT (Infrastructure Division)</b> | 8,332,247                                  | 8,522,175                                 | 8,522,175                                  | 0  |
| <b>TOTAL SERVICE EXPENDITURE (Revenue) Including Transport</b>      | <b>155,921,156</b>                         | <b>160,975,503</b>                        | <b>159,916,102</b>                         | <b>1,059,401</b>                             |
|   |  |   |  |  |

| <b>EDUCATION &amp; LIFELONG LEARNING</b>                    | <b>Original Estimate<br/>2022-23<br/>£</b> | <b>Revised Estimate<br/>2022-23<br/>£</b> | <b>Estimated Outturn<br/>2022-23<br/>£</b> | <b>Variance Under (Over)<br/>2022-23</b> |
|---|--|---|--|--|
| <b><u>SCHOOLS RELATED</u></b>                               |  |   |  |  |
| <b>Individual Schools Budget</b>                            | <b>122,872,495</b>                         | <b>126,821,439</b>                        | <b>126,821,439</b>                         | <b>0</b>                                 |
| <b>Post 16 Initiative (Grant Income)</b>                    | <b>(3,589,997)</b>                         | <b>(3,589,997)</b>                        | <b>(3,589,997)</b>                         | <b>0</b>                                 |
| <b>Earmarked Formula Funding (inc. Joint Use Sites)</b>     | <b>232,085</b>                             | <b>233,083</b>                            | <b>246,682</b>                             | <b>(13,599)</b>                          |
| <b>Schools LMS Contingencies</b>                            | <b>166,830</b>                             | <b>166,830</b>                            | <b>166,830</b>                             | <b>0</b>                                 |
| <b>Other Direct School Related</b>                          |  |   |  |  |
| Learning Support Staff Registration Fee                     | 21,486                                     | 21,486                                    | 21,486                                     | 0  |
| PFI Funding Gap   | 367,134                                    | 367,134                                   | 367,134                                    | 0  |
| PFI Building Maintenance                                    | 52,629                                     | 52,629                                    | 52,629                                     | 0  |
| Repairs & Maint. 50/50 Scheme (Re-instated)                 | 346,320                                    | 346,320                                   | 346,320                                    | 0  |
| School Meal Admin. Utility & Telephone                      | 449,512                                    | 473,500                                   | 473,628                                    | (128)                                    |
| Relief Supply Cover (Maternity)                             | 724,521                                    | 745,500                                   | 707,749                                    | 37,751                                   |
| Police Checks   | 64,816                                     | 64,816                                    | 55,902                                     | 8,914                                    |
| Copyright and Licensing (Schools)                           | 75,795                                     | 75,795                                    | 77,990                                     | (2,195)                                  |
| <b>Schools Covid Related - Post 1st April 2022</b>          |  |   | 286,151                                    | (286,151)                                |
| <b>Total Other Direct School Related</b>                    | <b>2,102,213</b>                           | <b>2,147,180</b>                          | <b>2,388,989</b>                           | <b>(241,809)</b>                         |
| <b>Early Years (Rising 3's)</b>                             | <b>891,544</b>                             | <b>891,544</b>                            | <b>862,696</b>                             | <b>28,848</b>                            |
| <b>Education Improvement Grant - Match Funding</b>          | <b>645,043</b>                             | <b>645,043</b>                            | <b>645,043</b>                             | <b>0</b>                                 |
| <b>Early Retirement Pension Costs of School Based Staff</b> | <b>1,940,261</b>                           | <b>2,076,080</b>                          | <b>1,743,079</b>                           | <b>333,001</b>                           |
| <b><u>EXPENDITURE TO DIRECTORATE SUMMARY</u></b>            | <b>125,260,474</b>                         | <b>129,391,202</b>                        | <b>129,284,761</b>                         | <b>106,441</b>                           |

| <b>EDUCATION &amp; LIFELONG LEARNING</b>                       | <b>Original Estimate<br/>2022-23<br/>£</b> | <b>Revised Estimate<br/>2022-23<br/>£</b> | <b>Estimated Outturn<br/>2022-23<br/>£</b> | <b>Variance Under<br/>(Over)<br/>2022-23</b> |
|--|--|---|--|--|
| <b>EDUCATION</b>   |  |   |  |  |
| <b>Management &amp; Support Service Costs</b>                  | <b>1,383,415</b>                           | <b>1,468,977</b>                          | <b>1,484,824</b>                           | <b>(15,847)</b>                              |
| <b>Social Inclusion</b>  |  |   |  |  |
| Psychological Service  | 963,985                                    | 981,268                                   | 875,977                                    | 105,291                                      |
| Behaviour Support  | 191,341                                    | 200,862                                   | 163,426                                    | 37,436                                       |
| Education Welfare Service                                      | 385,126                                    | 407,107                                   | 403,713                                    | 3,394  |
| Youth Offending Team   | 56,377                                     | 56,377                                    | 56,377                                     | 0  |
| Safeguarding & LAC   | 263,434                                    | 281,595                                   | 292,054                                    | (10,459)                                     |
| School Based Counselling                                       | 393,730                                    | 413,324                                   | 360,995                                    | 52,329                                       |
| <b>Total Social Inclusion</b>                                  | <b>2,253,993</b>                           | <b>2,340,533</b>                          | <b>2,152,542</b>                           | <b>187,991</b>                               |
| <b>Additional Learning Needs</b>                               |  |   |  |  |
| ALN Advisory Support Service                                   | 293,277                                    | 301,703                                   | 288,056                                    | 13,647                                       |
| Professional/Statementing                                      | 304,687                                    | 323,859                                   | 316,406                                    | 7,453  |
| Learning Support   | 47,199                                     | 50,355                                    | 50,630                                     | (275)  |
| Language Support Primary                                       | 444,055                                    | 456,908                                   | 337,755                                    | 119,153                                      |
| Specialist Resources   | 71,171                                     | 73,755                                    | 51,153                                     | 22,602                                       |
| ALN Improvement Initiative                                     | 3,602                                      | 3,602                                     | 3,602                                      | 0  |
| Childrens Centre   | 35,328                                     | 35,328                                    | 28,500                                     | 6,828  |
| SNAP Cymru   | 49,567                                     | 49,567                                    | 46,925                                     | 2,642  |
| Outreach Trinity Fields  | 55,949                                     | 57,569                                    | 57,569                                     | 0  |
| Speech Therapy   | 62,248                                     | 62,248                                    | 59,276                                     | 2,972  |
| SENCOM (Sensory Service)                                       | 813,135                                    | 813,135                                   | 812,912                                    | 223  |
| Autism (CASS)  | 217,105                                    | 217,105                                   | 217,105                                    | 0  |
| <b>Total Additional Learning Needs</b>                         | <b>2,397,323</b>                           | <b>2,445,134</b>                          | <b>2,269,889</b>                           | <b>175,245</b>                               |
| <b>Learning Pathways Partnership</b>                           |  |   |  |  |
| 14 - 19 Initiative (Transport Costs)                           | 137,923                                    | 137,923                                   | 107,754                                    | 30,169                                       |
| <b>Total Learning Pathways Partnership</b>                     | <b>137,923</b>                             | <b>137,923</b>                            | <b>107,754</b>                             | <b>30,169</b>                                |
| <b>EOTAS, Additional Support &amp; Out of County Provision</b> | <b>10,222,719</b>                          | <b>10,477,804</b>                         | <b>10,172,498</b>                          | <b>305,306</b>                               |
| <b>Early Years Provision &amp; Support</b>                     |  |   |  |  |
| Early Years Central Team                                       | 377,850                                    | 395,593                                   | 160,593                                    | 235,000                                      |
| <b>Total Early Years Provision &amp; Support</b>               | <b>377,850</b>                             | <b>395,593</b>                            | <b>160,593</b>                             | <b>235,000</b>                               |

| <b>EDUCATION &amp; LIFELONG LEARNING</b>                 | <b>Original Estimate<br/>2022-23<br/>£</b> | <b>Revised Estimate<br/>2022-23<br/>£</b> | <b>Estimated Outturn<br/>2022-23<br/>£</b> | <b>Variance Under<br/>(Over)<br/>2022-23</b> |
|--|--|---|--|--|
| <b>Other Service Provision</b>                           |  |   |  |  |
| SACRE  | 2,741                                      | 2,801                                     | 2,741                                      | 60   |
| Outdoor Education Advisor SLA                            | 32,265                                     | 32,265                                    | 32,265                                     | 0  |
| School Improvement                                       | 104,192                                    | 104,192                                   | 180,192                                    | (76,000)                                     |
| Music Service  | 426,588                                    | 446,938                                   | 446,938                                    | 0  |
| WJEC & Subscriptions                                     | 42,157                                     | 42,157                                    | 16,484                                     | 25,673                                       |
| <b>Total Other Service Provision</b>                     | <b>607,943</b>                             | <b>628,353</b>                            | <b>678,620</b>                             | <b>(50,267)</b>                              |
| <b>Education Achievement Service (EAS)</b>               |  |   |  |  |
| Contribution to EAS Joint Working                        | 980,663                                    | 980,663                                   | 980,663                                    | 0  |
| <b>Total Education Achievement Service</b>               | <b>980,663</b>                             | <b>980,663</b>                            | <b>980,663</b>                             | <b>0</b>                                     |
| <b>EXPENDITURE TO DIRECTORATE SUMMARY</b>                | <b>18,361,829</b>                          | <b>18,874,980</b>                         | <b>18,007,383</b>                          | <b>867,597</b>                               |
| <b><u>LIFELONG LEARNING</u></b>                          |  |   |  |  |
| <b>Adult Education</b>                                   | <b>94,505</b>                              | <b>133,619</b>                            | <b>133,619</b>                             | <b>0</b>                                     |
| <b>Youth Service</b>                                     | <b>1,323,834</b>                           | <b>1,381,031</b>                          | <b>1,344,701</b>                           | <b>36,330</b>                                |
| <b>Library Service</b>                                   | <b>2,455,496</b>                           | <b>2,579,725</b>                          | <b>2,541,823</b>                           | <b>37,902</b>                                |
| <b>LLL Insurance &amp; Non Operational Property/Land</b> | <b>92,771</b>                              | <b>92,771</b>                             | <b>81,640</b>                              | <b>11,131</b>                                |
| <b><u>EXPENDITURE TO SERVICE SUMMARY</u></b>             | <b>3,966,606</b>                           | <b>4,187,146</b>                          | <b>4,101,783</b>                           | <b>85,363</b>                                |