



## POLICY & RESOURCES SCRUTINY COMMITTEE – 29TH SEPTEMBER 2020

**SUBJECT: CASHLESS CATERING SOLUTION - SCHOOLS**

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

### 1. PURPOSE OF REPORT

- 1.1 The purpose of this report is to update Members on the current position with regards to the Council's Cashless catering solution in schools, and to seek endorsement of a recommendation to Cabinet for further funding to expand the provision.

### 2. SUMMARY

- 2.1 A Cashless catering provision allows pupils and parents to pay for school lunches via an online payment solution, enabling cash handling and associated administration to be significantly reduced in schools.
- 2.2 There is a cashless catering system currently operating in 9 of our secondary schools, which needs updating due to IT advancements, 10 primary schools (operating as part of a pilot) and 65 primary settings have no current cashless catering provision.
- 2.3 A procurement process has been undertaken and will be finalised if funding is approved.
- 2.4 Due to the recent events of Covid 19, it has become an urgent requirement for schools to reduce the amount of cash handled. The implementation of the cashless catering system would enable the service to significantly reduce cash payment for school meals and other school activities. The system will also support teachers and staff to keep pupils in individual classrooms.
- 2.5 The system will also enable schools to prevent any discrimination between paid and free school meals pupils.
- 2.6 Each individual schools administration officers will be able to support parents without online access. This support will consist of an online account being set up on behalf of the parent by the schools administration team.
- 2.7 The system will also provide additional features to allow parents to pay for school uniforms, trips and activities, photographs, tuck shops etc.
- 2.8 The system would also allow the accounting and administration of the payments for visitors and staff meals without cash payments being required.

- 2.9 Other efficiencies are also envisaged such as reduction / elimination of the need for a secure cash collection service

### **3. RECOMMENDATIONS**

- 3.1 Members are asked to: -
- a) Consider the information contained in the report.
  - b) Endorse a recommendation to Cabinet to proceed to purchase the cashless catering solution for 84 school settings.
  - c) Endorse a recommendation to Cabinet that the residual funding requirement of £246.5k be met from Education and Corporate Services Reserves.

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

- 4.1 To ensure Members are updated on the reasons why a cashless catering solution is vital within the school environment.
- 4.2 To allow a catering service to be provided in schools, a cashless catering solution is essential to be able to take payments for school meals.
- 4.3 To comply with internal audit recommendations.
- 4.4 To support the education settings to minimise the risk of cash handling associated with Covid 19.

### **5. THE REPORT**

- 5.1 A cashless catering provision allows pupils and parents to pay for school lunches via an online payment solution, enabling cash handling to be minimised in schools.
- 5.2 A cashless catering system is currently in 9 of our secondary settings, which needs updating due to IT advancements, 10 primary settings already operate the system, as a pilot, and 65 primary settings have no current cashless catering provision, so will require a complete install.
- 5.3 This report covers schools that are operated by the in-house provider Caerphilly Catering. Newbridge, St Martins, Ysgol Gyfyn Cwm Rhymni (Gellihaf site) and Lewis Secondary Schools, all run their own catering provision and operate their own cashless catering solution, so have not been considered as part of this report. However additional schools/sites are able to join throughout the contract duration subject to implementation costs being secured.
- 5.4 Cashless Catering has been in place in secondary schools since 2000. Over the years the systems have been developed and improved using the latest technology that has been available to us. Currently we offer online payments via apps or customers are able to pay online and in the Secondary sites payment can also be at either at a till point or a loader situated within the school canteen. Cash collected at these sites is collected 2 times a week by a secure cash collection service and each visit incurs a contractual charge.
- 5.5 In March 2016 an Internal audit was undertaken to establish how cash was collected and banked within our Primary Schools and the values and management of school

meal arrears within the system. The audit was based on a number of objectives and identified areas of improvements. Based on the findings of the audit report a cashless catering pilot system was introduced into 4 of our Primary Schools.

- 5.6 The pilot was for a year and involved colleagues across service areas from Internal Audit, Procurement, IT, Education Finance, Corporate Finance and key school representatives. The pilot was a great success, please refer to appendix 7. Cash collected and banked in these schools reduced by 91% and parental and school feedback was extremely positive, and this allowed an additional 5 schools to use this system please refer to appendix 6. To address all the findings raised in the audit report of March 2016, this solution needed to be rolled out to all remaining schools.
- 5.7 A full procurement process has very recently been completed, to implement and update cashless catering across 84 school settings.
- 5.8 Due to the recent events of Covid 19, it has become an urgent requirement for schools to reduce the amount of cash handled. The implementation of the cashless catering system would enable the service to minimise cash payment for school meals and other school activities. The system will also support teachers and staff to keep pupils in individual classrooms.
- 5.9 The system will also enable schools to prevent any discrimination between paid and free school meals pupils. The system will also be able to be updated daily with FSM entitlement, the current system only allows updates weekly.
- 5.10 Each individual schools administration officers will be able to support parents without online access. The schools administration team will set up an account on the parents behalf and manage this where necessary by adding funds in the back office administration system held at the school.
- 5.11 The system also provides additional features to allow parents to pay for school uniforms, trips and activities, photographs, tuck shops etc, and where primaries and secondary's within a cluster all use the system it will enable parents to manage school meal and other payments for their children from ages 4 to 16.
- 5.12 The cost of the cashless system is broken down as follows
- A yearly maintenance charge for a primary school will be £598.39
  - A yearly maintenance charge for a secondary school will be £1,963.23.
  - A yearly maintenance charge for a middle school will be £2,561.62
  - A yearly maintenance charge for a special school will be £598.39
  - 5 year Hardware Cost for 9 Secondary Schools based on average of 5 tills - £51,108.75 (per school £5,678.75);
  - 5 year Hardware Cost for 75 Primary Schools based on average of 2 tablets - £89,088.30 (per school £1,187.84);
  - One off WIFI costs are £6,000.
  - Installation, training, and software costs are £201,480.99
  - Staff Costs initially on an 18 month fixed term contracts are £72,255
  - The total cost of the cashless catering is £482,481.22.
  - Uniware's set up and preparation time is 41 days from start to finish..
  - Tablets will be configured by Uniware and Internal IT requirements can be undertaken at Tredomen. Anticipated resource for implementation is 3 days for 2 members of staff.

It is proposed that the Authority meets the installation, training, hardware and software costs and maintenance costs for the remainder of this financial year. With maintenance costs from year 2 on being met by individual schools. This will allow

schools time to budget for this increased cost.

- 5.13 It is proposed that training is undertaken by virtual webinars and a train the trainer approach.
- 5.14 There is an extensive range of YouTube videos available for both customers and backend office users on how to use the system. Please see [https://www.youtube.com/channel/UCUZC0K5IQfENzOpP0jBq1DA/videos?disable\\_polymer=1](https://www.youtube.com/channel/UCUZC0K5IQfENzOpP0jBq1DA/videos?disable_polymer=1)
- 5.15 It is proposed, subject to member approval to rollout the provision to all schools with immediate effect if approval is given.
- 5.16 If approval is given there will be benefits to both the organisation and service user.
- 5.17 The organisational benefits of the cashless catering system is to:
- Be able to operate a catering provision whilst managing the risks associated with Covid 19;
  - Reduce the audit reports finding of “High Risk” to “Low Risk”;
  - Maximise income levels;
  - A reduction in schools meals arrears;
  - Every child’s account has an overdraft facility that allows a credit for one meal. The school can add additional funds if required from the schools account. This will prevent any child going without a meal, and where appropriate e.g. welfare concerns, additional meals can be authorised by Head Teachers
  - Guest and staff meals can also be administered more effectively than the current system.
  - Ensuring financial regulations are met and all income is collected and banked in a timely and efficient manner;
  - Reduction or elimination of the need to use secure cash collection services or the onsite administration of bank deposits of the cash collected.
  - Management information that is timely, accurate and can be easily audited and monitored to measure performance and customer satisfaction;
  - Establishment of a fully supported IT system. The schools meals register currently used is unsupported and has reached the end of its life cycle;
  - Implementation of a single system would have direct benefits on the Income Team (Corporate Finance) in terms of staff resources;
  - Ensure the Authority is better prepared for the future of meeting customer’s needs within a digital world.
  - Any additional duties required to reconcile income takings will be undertaken centrally and therefore will have no impact on school clerk’s duties.

#### **5.18 Service User Benefits**

- Online system that allows parents to access the system either through the App Store, Google Play or in the Windows Store; Please see appendix 1 for an example;
- Allows parents to view the menu selection made by their child. The access also enables parents to view an up to date statement of the account balance, purchases made and any promotional offers available. Please see appendix 2 for an example;
- Provides peace of mind for parents who can see the meals their children are purchasing. Alternatively, should they wish, parents can dictate the school meals to be provided with allergen & nutritional information presented to them online. This will help us comply with the recent legislation on allergen awareness; Please see appendix 3 for an example;
- The money automatically goes to a central bank account, avoiding cash and

- cheques having to be sent to the school. Parents can also check balances and transactions online. The service is available 24 hours a day, seven days a week.
- A reward system is available for healthy eating choices; (Please refer to appendix 8)
  - There are currently restrictions placed on how parents are able to pay for school dinners depending on the resources available in individual schools. Implementation of a digital system would remove these restrictions ensuring parity and equality and also free up resources within schools;
  - Allow 24hrs a day / 7 days a week access for customers. If there are any technical issues the system has a backup facility which will allow the system to be functional and when the system is back up and running it will update accordingly.
  - Improvement in governance control measures;
  - Reduce volumes of cash held by the schools which improves security measures currently in place;
  - Free school meals are easily manageable alongside paid meals;
  - The school will not be working in deficit and waiting to collect the debt from parents as lunches, trips etc. are paid upfront;
  - Simplification and streamlines the process for parents and administrators;
  - Reduces queueing time and the risk of theft/loss of cash; If a child loses / stolen their card then as soon as it is reported an immediate block is put on the account to stop any unauthorised usage.
  - All parents / guardians are encouraged to use the online top up facility to remove the risk of a child losing money or being bullied and having the money taken off them.
  - Reduce amount of unnecessary trips and school traffic at peak times;
  - Parents can be more organised for the school day;
  - The system ensures funds are spent appropriately on food at the schools as intended by parents and not taken to the shops by the children to purchase sweets etc.;
  - Avoids instances of bullying as the online funds are kept private;
  - If a school clerk is absent the parent / guardian can still pay for school meals. School clerks are very often part time;
  - Prevents pupils carrying money into school which will help to reduce the potential for bullying;
  - Creates a personalised shopping experience for customers;
  - Offers the potential for additional features to allow parents to pay for school uniforms, trips and activities, photographs, tuck shops etc;
  - Where the system is in use within all schools in a cluster accounts will be able to be ported from primary to primary or from primary to secondary.
  - If children are showing a credit amount on their account and move to another LA school the credit sum on the account will be refunded.

## **6. ASSUMPTIONS**

- 6.1 No assumptions have been made in relation to this report.

## **7. LINKS TO RELEVANT COUNCIL POLICIES**

- 7.1 Caerphilly's Attainment Strategy: To raise standards and ensure our learners are healthy, confident, proud and ambitious and can access high quality educational opportunities, settings and experience.

- 7.2 Caerphilly's Wellbeing Objectives 2018 to 2023. This proposal will assist the Authority in meeting these objectives in particular the following:

Well-being Objective 1 – Improve Education opportunities for all.

## 8. WELL-BEING OF FUTURE GENERATIONS

8.1 The Well-Being of Future Generation (Wales) Act 2015 is about improving the social, economic, environmental and cultural wellbeing of Wales. It requires public bodies to think more about the long-term, working with people and communities, looking to prevent problems and take a more joined up approach. This will create a Wales that we all want to live in, now and in the future. The Act puts in place seven well-being 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.

8.2 The Act sets out the sustainable development principle against which all public bodies in Wales should assess their decision-making. The aim of the legislation is to ensure the well-being of future generations through maximising the contribution public bodies make towards the well-being goals. In using the sustainable development principle it is incumbent that the authority considers the whole of the population it serves and considers the effect of its actions on future generations. The principle, also known as the five ways of working is assessed below:

- **Long Term** - Management information on free school meal uptake which is necessary for the Revenue Support Grant (RSG). We want to improve accessibility throughout the county borough, through a range of ways including better digital access. Our goal is that every child should have the best start in life, and the opportunity to achieve success as a young person and as an adult.
- **Prevention** - To help people make the best use of their household income and manage their debts. Close the gap in life expectancy for residents between the most and least deprived areas in the Borough.
- **Integration** - Improve outcomes for all learners, particularly those vulnerable to under achievement
- **Collaboration** – The cashless catering solution is collaboration between Catering Services and Education establishments to remove any discrimination between pupils who are either paying or receiving a free school meal allowance.
- **Involvement** – Throughout the pilot there has been consultation between all relevant stakeholders, e.g. Head Teachers, Education Officers, Internal Audit, IT, Procurement, Governing bodies, parents and pupils.

## 9. EQUALITIES IMPLICATIONS

9.1 This will also have a positive impact on the children and young people attending schools that have allergies and medical needs.

9.2 The majority of customers are children and young people. Children will no longer have to carry cash. This is a positive outcome due to there being less opportunity for them to be bullied or to lose the money.

- 9.3 The Cashless system works the same for all children whether they pay or have a free school meal. The amount allocated for the free school meal will be automatically added onto the system.
- 9.4 For those families that don't have IT equipment at home the system can be accessed using smart phones. This system allows children to put money on to their account via a cash revaluation terminal located in the school (in secondary schools) and in primary schools cash can be given to the school clerk who will update the child's account in systems back office. This is then used to pay for food and drink in the canteen.
- 9.5 Schools will also have the ability to add additional funds to pupil's accounts in extreme cases to ensure that any vulnerable / safeguarding issues with individual pupils / families are able to be managed by the Head teacher or nominated school representative.

## **10. FINANCIAL IMPLICATIONS**

- 10.1 To support the rollout of the cashless catering provision, two additional posts will be required, one within finance and one within catering. The posts will initially be fixed term for 18 months and reviewed before the end of the fixed term period. The costs for these posts are estimated as £72k.
- 10.2 The 2019/20 Provisional Outturn Report included a proposal to set aside £236k for cashless catering and this was agreed by Cabinet on the 1<sup>st</sup> July 2020.
- 10.3 The annual Maintenance costs for the system for all school settings provisions will be charged to the individual schools, from year 2, which equates to £62,5k.
- 10.4 The total sum of the system is £482.5k, the yearly maintenance costs of £62,5k will be charged to schools settings from year 2. The additional funding requirement is £246.5k. It is proposed that this will be funded from Education & Corporate Services Reserves.

## **11. PERSONNEL IMPLICATIONS**

- 11.1 There are no personnel implications.

## **12. CONSULTATIONS**

- 12.1 The following consultees have had been involved and consulted.

## **13. STATUTORY POWER**

- 13.1 The Healthy Eating in Schools (Wales) Measure 2013  
Requirement (Wales) Regulations 2013 Free Breakfast Clubs

Author: Sue Richards, Head of Education Planning and Strategy

Consultees: Richard Edmunds, Corporate Director of Education and Corporate Services  
Christina Harray, Chief Executive  
Mark S Williams, Interim Corporate Director of Communities  
Dave Street, Corporate Director Social Services & Housing

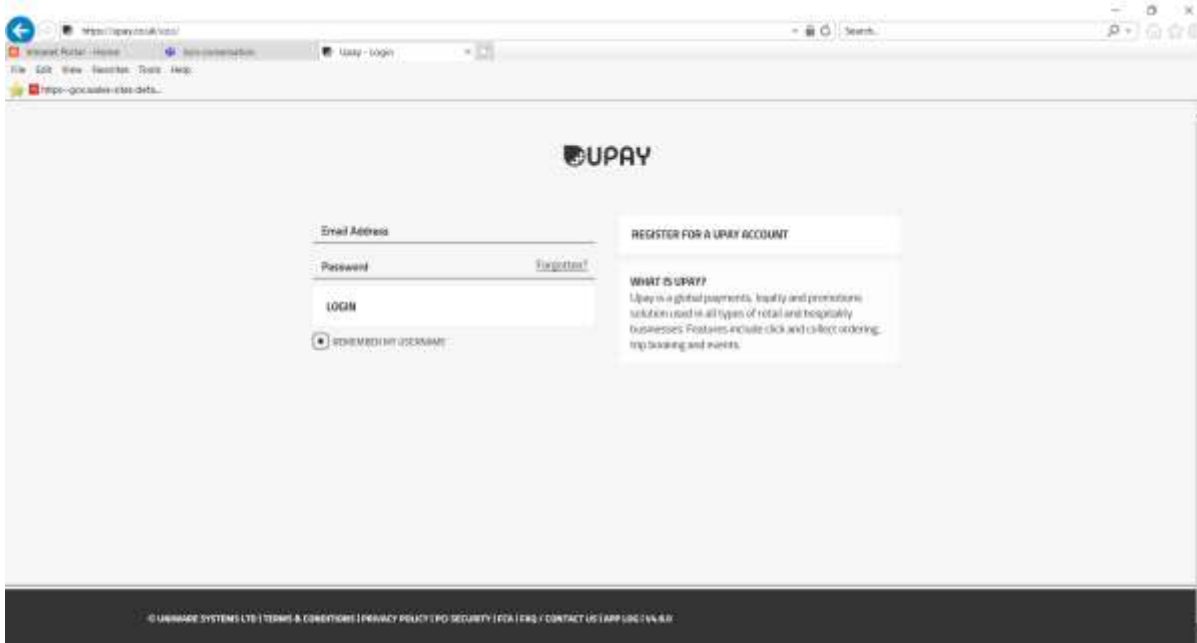
Keri Cole, Chief Education Officer  
Steve Harris, Acting S151 Officer  
Sue Richards, Head of Education Planning & Strategy  
Liz Lucas, Head of Customer and Digital Services  
Lynne Donovan, Head of People Services  
Rob Tranter, Head of Legal Services & Monitoring Officer  
Jane Southcombe, Finance Manager, Education, Lifelong Learning & Schools  
Clare Rogers, Business Development Manager  
Neil Rich, IT Development Officer  
Jess Thomas, Procurement Officer  
Deborah Gronow, Audit Group manager  
A Cullinane, Senior Policy Officer (Equalities & Welsh Language)  
Marcia Lewis, Catering Manager  
Cllr Jaimie Pritchard, Chair of Policy and Resources Scrutiny Committee  
Cllr Gez Kirby, Vice Chair of Policy and Resources Scrutiny Committee  
Cllr Teresa Parry, Chair of Education Scrutiny Committee  
Cllr Carole Andrews, Vice Chair of Education Scrutiny Committee  
Cllr Ross Whiting, Cabinet Member for Learning and Achievement  
Cllr Eluned Stenner, Cabinet Member for Finance, Performance and Customer Services

Appendices: Appendix 1 – Screen shot of Upay Chilli logon screen  
Appendix 2 – Screen shot of users' statement  
Appendix 3 – Screen shot of allergens for a pupil  
Appendix 4 – Screen shot from Saffron of nutritional information for a week  
Appendix 5 – Online ordering screen shot  
Appendix 6 – Percentage uptake of online payments for the first 4 schools pilot schools (after the completion of 1 term)  
Appendix 7 – Feedback comments from Head Teachers and parents  
Appendix 8 – Sample of reward scheme currently in place within the Secondary sector  
Appendix 9 – Equality Impact Assessment Form






## Appendix 1

### Screen shot of Upay Chilli Logon Screen




Appendix 2

Screen shot of users' statement

☰   

Last 30 days ▼

**HIDE PRODUCT DETAILS** 

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**ACCOUNT TYPE: CASHLESS**

START BALANCE	£	920.98
MONEY IN	£	0.00
MONEY OUT	£	17.28
<b>END BALANCE</b>	<b>£</b>	<b>903.70</b>

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Fri 7 Aug Online Ordering Web site

**Sale** £0.00 **Balance** **£903.70**

PRODUCT	TOTAL
1 x CARROT CAKE	£ 0.00
1 x CARROT CAKE	£ 0.75

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Fri 7 Aug Online Ordering Web site

**Sale** £0.00 **Balance** **£903.70**

PRODUCT	TOTAL
1 x CARROT CAKE	£ 0.75

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Fri 7 Aug Online Ordering Web site

**Sale** £0.00 **Balance** **£903.70**

PRODUCT	TOTAL
1 x CARROT CAKE	£ 0.75

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Thu 6 Aug Online Ordering Web site

**Sale** £0.00 **Balance** **£903.70**

### Appendix 3

#### Screen shot of allergens for a pupil

**Update Allergies** ✕

Allergies:

<input type="checkbox"/> GLUTEN	<input checked="" type="checkbox"/> CRUSTACEANS
<input checked="" type="checkbox"/> EGGS	<input checked="" type="checkbox"/> FISH
<input type="checkbox"/> PEANUTS	<input type="checkbox"/> SOYA
<input checked="" type="checkbox"/> MILK	<input type="checkbox"/> NUTS
<input type="checkbox"/> CELERY	<input type="checkbox"/> MUSTARD
<input type="checkbox"/> SESAME	<input type="checkbox"/> SO2 AND SULPHITES
<input type="checkbox"/> LUPIN	<input checked="" type="checkbox"/> MOLLUSCS
<input type="checkbox"/> WHEAT	<input type="checkbox"/> RYE
<input type="checkbox"/> BARLEY	<input type="checkbox"/> OATS
<input type="checkbox"/> ALMONDS	<input type="checkbox"/> HAZELNUTS
<input type="checkbox"/> WALNUTS	<input type="checkbox"/> BRAZIL NUTS
<input type="checkbox"/> CASHEWS	<input type="checkbox"/> PECANS
<input type="checkbox"/> PISTACHIOS	<input type="checkbox"/> MACADAMIA NUTS

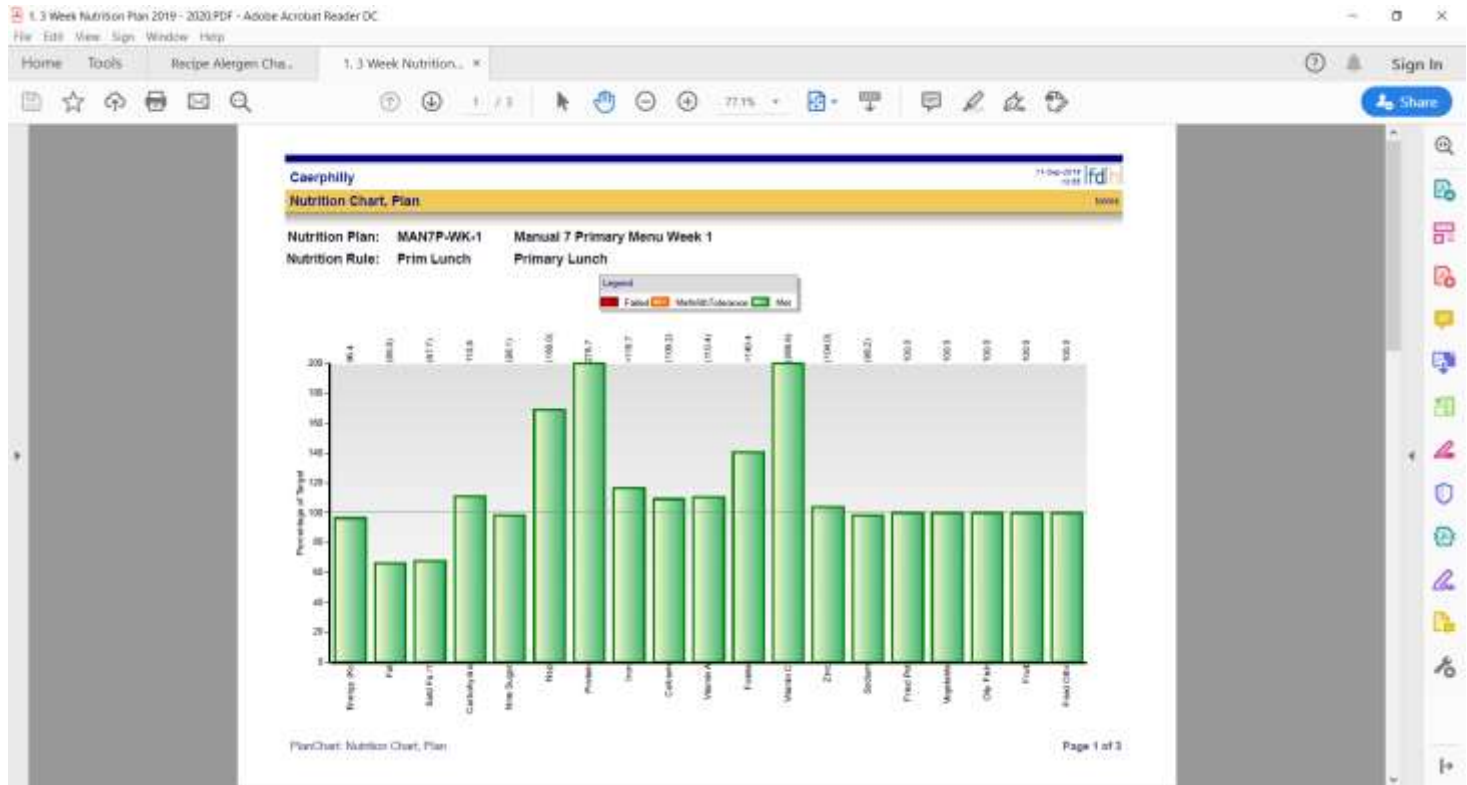
**UPDATE ALLERGIES**

**CANCEL**

CONTINUE

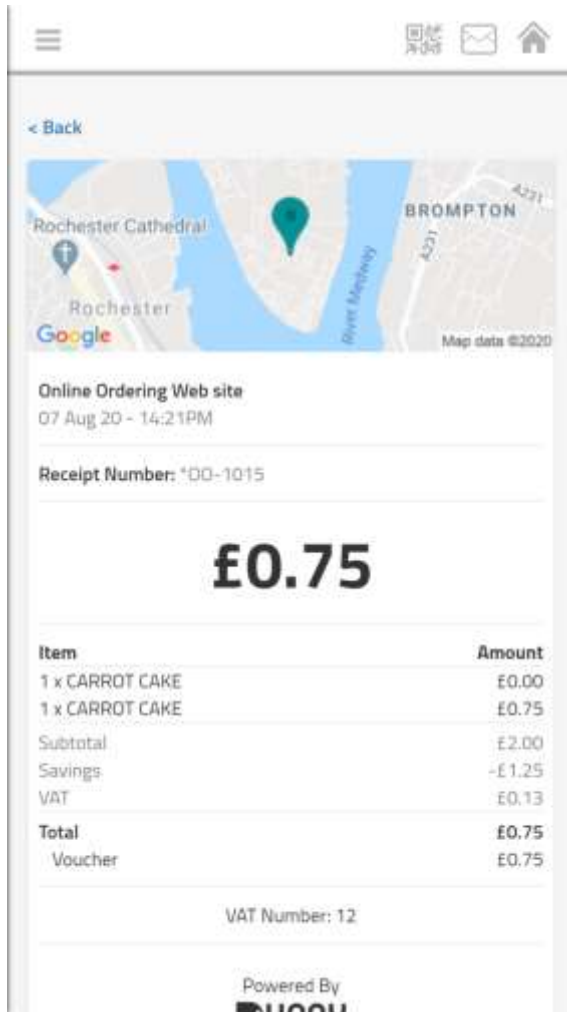
# Appendix 4

## Screen shot from Saffron of nutritional information for a week



## Appendix 5

### Online Ordering Screen Shot



The screenshot shows a mobile application interface for an online ordering receipt. At the top, there is a navigation bar with a hamburger menu icon on the left and icons for QR code, email, and home on the right. Below the navigation bar is a back button labeled "< Back". The main content area features a Google Map of Rochester, showing the River Medway and Brompton. A green location pin is placed on the map. Below the map, the text reads "Online Ordering Web site" and "07 Aug 20 - 14:21PM". The receipt number is displayed as "Receipt Number: \*00-1015". The total amount is prominently displayed as "£0.75". Below this is a table with two columns: "Item" and "Amount". The table lists two items: "1 x CARROT CAKE" for £0.00 and "1 x CARROT CAKE" for £0.75. The subtotal is £2.00, savings are -£1.25, and VAT is £0.13. The total is £0.75, and the voucher amount is also £0.75. The VAT number is 12. At the bottom, it says "Powered By" followed by the logo for "LUCU".

< Back

Rochester Cathedral  
Rochester  
BROMPTON  
River Medway  
A231  
A231  
Map data ©2020

Online Ordering Web site  
07 Aug 20 - 14:21PM

Receipt Number: \*00-1015

**£0.75**

Item	Amount
1 x CARROT CAKE	£0.00
1 x CARROT CAKE	£0.75
Subtotal	£2.00
Savings	-£1.25
VAT	£0.13
<b>Total</b>	<b>£0.75</b>
Voucher	£0.75

VAT Number: 12

Powered By  
**LUCU**

## Appendix 6

### Percentage uptake of online payments for the first 4 schools pilot schools (After the completion of 1 term)

	SCHOOL NAME	Totals		
		Total	Cash %	Online
4020	Pengam Primary (2058)	£19,852.60	18%	82%
4025	Fleur-De-Lys Primary (2061)	£13,595.19	6%	94%
4064	Blackwood Primary (2379)	£39,468.22	17%	83%
4534	Ysgol Cwm Derwen (2394)	£27,105.12	1%	99%

#### NB

It should be noted that when the pilot was initially introduced the take up of the online payments resulted in a slower up take by parents in both Pengam Primary and Blackwood Primary. The catering service worked in partnership with both schools to help parents to load on line at the school or through the catering head office which resulted in greater up take at both sites. Cash has reduced in all areas and been maintained and debt has been reduced across all sites.

#### Comment from School Clerk Pengam and Fleur Dy Lys Primary

*“At the beginning of the cashless catering trial, we were still taking 18% cash after the first term. We found that Pengam parents were a little nervous to use the new cashless system.*

*We discussed the benefits of the system with the parents who were still sending in cash. We then encouraged them to register on the Upay Chilli app and see how easy it was to use.*

*We noticed after that that we were taking less cash, and now all parents use the cashless system”*

## **Appendix 7**

### **Feedback comments from Head Teachers and Parents**

#### **Comment from a parent of a pupil in Whiterose Primary**

*“The cashless system that the school uses for our children's dinners as made life a lot easier, I use the app to top up my child's account, making life easier in the morning not having to find money. It is so quick and easy to use and was so simple to set up. The app is really good, you can keep track on how much money is on your child's account and not have to worry about not having money to give every week.”*

#### **Comment from a parent of a pupil in Abercarn Primary**

*“The cashless catering system has been an absolute life saver and made the whole process of my children having dinners so much easier. It saves me having to find money each week or day to pay for their meals; I simply use the system to top up for me. It means that it's one less thing for me to worry about on a daily basis. I would highly recommend any school using it, they won't be sorry”.*

#### **Comment from Head Teacher in Abercarn Primary**

*“The cashless catering system has proven to be very effective and worthwhile. It's super convenient with a lot less admin. It means we have no cash coming into school for dinners – no money is lost or mislaid. Admin staff can be very proactive checking the system and we have no debts. Parents find it super convenient and have really welcomed the system”.*

#### **Comment from Cook in Charge of Blackwood Primary**

*“When I was asked to become a pilot site for the cashless catering system I was so nervous and apprehensive as I was not used to using IT. Once the system was implemented it was so simple to use it has encouraged me to use IT more widely in both work and at home”.*

#### **Comment from Head Teacher of Ystrad Mynach Primary**

*“The cashless system has transformed the way that we administer meals to children. Time effective, efficient, and easy to analyse data and reports. Parents and Office staff find it easy and accessible to use. We advocate its implementation in schools”.*

#### **Comment from School Clerk from in Ysgol Cwm Derwen**

*“I think the system is fantastic, not only has it made administration far more streamlined and auditable, it reduces any difficult conversations taking place between myself and parents who dispute cash payments made to the school as the system is fully auditable and receipts are issued to parents when payment is made”.*

#### **Comment from a parent of a pupil in Ysgol Cwm Derwen**

*“Cashless catering takes a weight off my mind as I have automated top ups which means there is always credit on my child's account so I know they will always have a meal”.*

#### **Comment from Pengam Primary**

*“We were asked to take part in a pilot for cashless catering some time ago. The Headteacher, Governors and office staff were happy and very keen to trial the system.”*

*The system is easy to use for both office staff and also parents. They top up on line and are able to use an auto top up which tops up their child's account when it goes below a certain amount, which parents find useful.*

*The office staff are able to run a report in the morning which shows who has a low balance, they then text parents who then top up before lunchtime. This works well in Pengam.*

*When we first piloted the system we would take cash but encourage parents to sign up for the Upay Chilli app. We then made the decision to stop taking cash as office staff would be banking very small amounts of cash. We helped the parents to sign up for the app and all parents are happy to top up on line.*

*The benefits of the cashless system are vast but the main benefits are that office staff do not have to record every individual cash/cheque payments against pupils on an outdated spreadsheet, which was extremely time consuming, office staff do not have to count money and bank several times a week. There is no debt in the school which is a huge benefit. If a child has a minus balance we ask that the parent either tops up or provides a packed lunch until the debt is paid. This system works as parents then top up their child's account. The system is easy to use and office staff only have to spend a small amount of time on dinners. This has given them more time to concentrate on other duties. All reports are easy to navigate. It is easy to find a pupil's unique number and check their accounts and amend anything if needed.*

*The Headteacher, Governors, office staff and cook in charge would not be without the system now, it is easy to use. "*

#### **Comment from a parent of a pupil in Pengam Primary**

*"As a parent I find the app and the system as a whole really simple to use and great for seeing what the children have had for their school dinners each day. I find the auto top-up beneficial as I don't have to remember to add funds to their accounts each week (although this is far easier than having to dash to the cash point every Sunday night before this system was introduced!), and it saves the school clerks having to chase payment. I'm really pleased the school have this system in place as it makes my life as a busy working parent much simpler!"*



## Appendix 8

### Sample of reward scheme currently in place within the Secondary sector. The cashless catering proposal would facilitate similar schemes across all schools

#### Points Make Prizes – Parental Guidance

The Points Make Prizes scheme was developed by Caerphilly County Borough Council's Catering department to promote healthy eating. A new healthy menu range was launched a few years ago with tariff incentives for healthier food items and a range of health promotion initiatives.

We have introduced a web-based points reward scheme administered via the cashless system which promotes the uptake of healthy options. Students can request a statement of accumulated points at the end of each term for healthy eating, which they can then use to exchange online for a range of appealing prizes such as High Street vouchers and cafeteria reward vouchers.

We have been supported by partnership working with schools, NPHS, Health Challenge Caerphilly, the Welsh Assembly Government, suppliers and other partners to ensure that the borough's young people are offered the best in school catering facilities.

More recently, the service provided by Caerphilly Catering has been reviewed in line with the guidelines detailed in the Welsh Assembly Government's "Appetite For Life" Guidance. This has prompted a number of changes to the service style, menu and the website - most notably, full nutritional analysis of all menu items to ensure a balanced menu is on offer to all pupils.

#### How do I redeem my prizes?

Please email [catering@caerphilly.gov.uk](mailto:catering@caerphilly.gov.uk), stating **POINTS REDEMPTION** in the header. Please state your name, school, school year, how many points you have on your account, and what prize you would like to claim. If you do not have access to email, you can write to us to redeem your points – please send the letter to Caerphilly Catering, Penallta House, Tredomen Business Park, Hengoed CF82 7PG

Your prize will be taken to your school cafeteria and delivered to you personally. Please note, that if you redeem your points in the summer holidays, you will have to wait until the start of the new school term to receive your prize.

#### What kind of prizes can I buy with my points?

Caerphilly County Borough Council have a selection of exciting products for you to spend your hard-earned points on. These prizes will vary monthly and will be published at your school site.

#### Terms and Conditions

Listed below are the Caerphilly County Borough Councils Point Scheme terms and conditions. If you have any questions about these terms, or any other related issue, please write to us at the following address: Caerphilly Catering, Penallta House, Tredomen Business Park, Hengoed CF82 7PG.

1. The Points Make Prizes Scheme is administered by and remains the property of Caerphilly County Borough Council, who reserve the right to decline issue or withdraw the scheme at any time without notice.
2. All participants in the scheme must be a pupil within a Caerphilly Catering-run school.
3. The Cashless Catering account is not transferable, and can only be used by the person whose name is on the account.
4. Members may be removed from the scheme at any time at the discretion of Caerphilly County Borough Council.

#### POINTS

1. To earn points for a transaction in the Points Makes Prizes Scheme, you must be a member of the cashless catering system which is run by either a card transaction or the biometric system.
2. Pupils can only use their card / biometric system to purchase food for their own consumption. Regular checks are carried out and pupils found to be buying food for others to accumulate points will receive no reward.

#### REWARDS

1. Rewards can only be redeemed if you have the appropriate number of points on your card / biometric system.
2. There are a limited number of prizes available each year.
3. Meal Deal prizes are for the value of the current price.
4. A reward can be removed/ replaced without notice, and are subject to availability.
5. Should a reward become unavailable, Caerphilly County Borough Council reserve the right to send an equivalent replacement.
6. Rewards run from a school academic year i.e. September to July each year.
7. Remaining points will be reset back to zero at the end of the school academic year
8. All redemption requests for each school academic year must be made by 31st July of that year.

Please note that there is a redemption processing period of up to 28 days for all prizes that are external to the school site i.e. vouchers Prizes that can be used in the school cafeteria (such as Meal Deals Priority Pass tickets) will be made available within a month of the claim.

# EQUALITY IMPACT ASSESSMENT FORM

July 2019

## THE COUNCIL'S EQUALITIES STATEMENT

This Council recognises that people have different needs, requirements and goals and we will work actively against all forms of discrimination by promoting good relations and mutual respect within and between our communities, residents, elected members, job applicants and workforce.

We will also work to create equal access for everyone to our services, irrespective of ethnic origin, sex, age, marital status, sexual orientation, disability, gender reassignment, religious beliefs or non-belief, use of Welsh language, BSL or other languages, nationality, responsibility for any dependents or any other reason which cannot be shown to be justified.

EIAs are a legal requirement under equalities legislation (Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011) where the potential for a significant negative impact has been identified. This legislation has been in place since 2000. We also have a legislative duty to:

- eliminate unlawful discrimination, harassment and victimisation and other conduct that is prohibited by the Equality Act 2010
- advance equality of opportunity between people who share a relevant protected characteristic and those who do not
- foster good relations between people who share a protected characteristic and those who do not.

The Act explains that having due regard for advancing equality involves:

- removing or minimising disadvantages experienced by people due to their protected characteristics
- taking steps to meet the needs of people from protected groups where these are different from the needs of other people
- encouraging people with protected characteristics to participate in public life or in other activities where their participation is disproportionately low.

The protected characteristics are:

- |                                  |                                  |
|----------------------------------|----------------------------------|
| • Age                            | • Race                           |
| • Disability                     | • Religion, Belief or Non-Belief |
| • Gender Re-assignment           | • Sex                            |
| • Marriage and Civil Partnership | • Sexual Orientation             |
| • Pregnancy and Maternity        | • Welsh Language*                |

- \* The Welsh language is not identified as a protected characteristic under the Equality Act 2010, however in Wales we also have to treat Welsh and English on an equal basis as well as promoting and facilitating the use of the Welsh language.

## THE EQUALITY IMPACT ASSESSMENT

<b>NAME OF NEW OR REVISED PROPOSAL *</b>	Provision of Cashless Catering System
<b>DIRECTORATE</b>	Education and Corporate Services
<b>SERVICE AREA</b>	Catering
<b>CONTACT OFFICER</b>	Marcia Lewis
<b>DATE FOR NEXT REVIEW OR REVISION</b>	August 2025

**\*Throughout this Equalities Impact Assessment Form, ‘proposal’ is used to refer to what is being assessed, and therefore includes policies, strategies, functions, procedures, practices, initiatives, projects and savings proposals.**

The aim of an Equality Impact Assessment (EIA) is to ensure that Equalities and Welsh Language issues have been proactively considered throughout the decision making processes governing work undertaken by every service area in the Council as well as work done at a corporate level.

The Council’s work across Equalities, Welsh Language and Human Rights is covered in more detail through the **Equalities and Welsh Language Objectives and Action Plan 2016-2020**.

When carrying out an EIA you should consider both the positive and negative consequences of your proposals. If a project is designed for a specific group e.g. disabled people, you also need to think about what potential effects it could have on other areas e.g. young people with a disability, BME people with a disability.

There are a number of supporting guidance documents available on the **Corporate Policy Unit Portal** and the Council’s Equalities and Welsh Language team can provide advice as the EIA is being developed. Please note that the team does not write EIAs on behalf of service areas, the support offered is in the form of advice, suggestions and in effect, quality control.

Contact [equalities@caerphilly.gov.uk](mailto:equalities@caerphilly.gov.uk) for assistance.

## PURPOSE OF THE PROPOSAL

1	<p><b>What is the proposal intended to achieve?</b> <i>(Please give a brief description and outline the purpose of the new or updated proposal by way of introduction.)</i></p> <p>To install and maintain a cashless payments systems within the Council's Primary Schools and Secondary Schools.</p> <p>It should be noted that the Council already has a cashless catering contract in place with Uniware, which expires on 31 March 2021. However, a new arrangement needed to be put in place for the solution to be rolled out to all Primary Schools in readiness for the schools returning in September to reduce cash handling and minimise associated risks as detailed in Covid 19 guidance.</p>
2	<p><b>Who are the service users affected by the proposal?</b> <i>(Who will be affected by the delivery of this proposal? e.g. staff members, the public generally, or specific sections of the public i.e. youth groups, carers, road users, people using country parks, people on benefits etc. Are there any data gaps?)</i></p> <p>Young people and families, teaching and catering staff.</p>

## IMPACT ON THE PUBLIC AND STAFF

3	<p><b>Does the proposal ensure that everyone has an equal access to all the services available or proposed, or benefits equally from the proposed changes, or does not lose out in greater or more severe ways due to the proposals?</b> <i>(What has been done to examine whether or not these groups have equal access to the service, or whether they need to receive the service in a different way from other people?)</i></p> <p>There are currently restrictions placed on how parents are able to pay for school meals depending on the resources available in individual schools.</p> <p>Implementation of a digital system would remove these restrictions ensuring parity and equality and also free up resources within schools.</p> <ul style="list-style-type: none"><li>•Allow 24hrs a day / 7 days a week access for customers. If there are any technical issues the system has a backup facility which will allow the</li></ul>
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system to be functional and when the system is back up and running it will update accordingly.

- Improvement in governance control measures;
- Reduce volumes of cash held by the schools which improves security measures currently in place;
- Free school meals are easily manageable alongside paid meals;
- The school will not be working in deficit and waiting to collect the debt from parents as lunches, trips etc. are paid upfront.
- Simplification and streamlines the process for parents and administrators;
- Reduces queueing time and the risk of theft/loss of cash; If a child loses / stolen their card then as soon as it is reported an immediate block is put on the account to stop any unauthorised usage.
- All parents / guardians are encouraged to use the online top up facility to remove the risk of child losing money or being bullied and having the money taken off them.
- Reduce amount of unnecessary trips and school traffic at peak times;
- Parents can be more organised for the school day;
- Provides peace of mind for parents who can see the meals their children are purchasing. Alternatively, should they wish, parents can dictate the school meals to be provided with allergen & nutritional information presented to them online. This will help us comply with the recent legislation on allergen awareness;
- The system ensures funds are spent appropriately on food at the schools as intended by parents and not taken to the shops by the children to purchase sweets etc.;
- Avoids instances of bullying as the online funds are kept private;
- If a school clerk is absent the parent / guardian can still pay for school meals. School clerks are very often part time;
- Prevents pupils carrying money into school which will help to reduce the potential for bullying;
- Creates a personalised shopping experience for customers;
- Offers the potential for additional features to allow parents to pay for school uniforms, trips and activities, photographs, tuck shops etc.

4	<p><b>Is your proposal going to affect any people or groups of people with protected characteristics?</b>  <i>(Has the service delivery been examined to assess if there is any indirect effect on any groups? Could the consequences of the policy or savings proposal differ dependent upon people's protected characteristics?)</i></p>	
Protected Characteristic	Positive, Negative, Neutral	What will the impact be? If the impact is negative how can it be mitigated?
Age	Positive	<p>The majority of customers are children and young people. Children will no longer have to carry cash. This is a positive thing because there is less opportunity for them to be bullied or to lose the money.</p> <p>Cashless system works the same for all children whether they pay or have a free school meal. The amount allocated for the free school meal will be automatically added onto the system.</p> <p>For those families that don't have IT equipment at home the system can be accessed using smart phones. This system allows children to put money on to their account via a cash revaluation terminal located in the school (in secondary schools) and in primary schools cash can be given to the school clerk who will update the child's account in systems back office. This is then used to pay for food and drink in the canteen.be able to use the system.</p> <p>Schools will also have the ability to add additional funds to pupil's accounts in extreme cases to ensure that any vulnerable / safeguarding issues with individual pupils / families are able to managed by the Head teacher or nominated school representative.</p>
Disability	Neutral	<p><b>The impact of cashless catering does not impact additionally on these groups</b></p>
Gender Reassignment	Neutral	
Marriage & Civil Partnership	Neutral	
Pregnancy and Maternity	Neutral	
Race	Neutral	
Religion & Belief	Neutral	
Sex	Neutral	
Sexual Orientation	Neutral	

**5**

**In line with the requirements of the Welsh Language Standards. (No.1) Regulations 2015, please note below what effects, if any (whether positive or adverse), the proposal would have on opportunities for persons to use the Welsh language, and treating the Welsh language no less favourably than the English language.**

*(The specific Policy Making Standards requirements are Standard numbers 88, 89, 90, 91, 92 and 93. The full detail of each Standard is available on the Corporate Policy Unit Portal. Although it is important that what is outlined in the proposal is available in Welsh and English, please consider wider impacts on Welsh speakers.)*

The system complies with the Welsh Language Standards. Parents will be written to regarding the system bilingual communication etc.



## INFORMATION COLLECTION

6

**Please outline any evidence and / or research you have collected which supports the proposal? This can include an analysis of service users.**

*(Is this service effectively engaging with all its potential users or is there higher or lower participation of uptake by one or more protected characteristic groups? If so, what has been done to address any difference in take up of the service? Does any savings proposal include an analysis of those affected?)*

An initial pilot included 4 primary schools, which was extended to 10 was run for 1 year. The evaluation of the pilot evidenced that the system had been a great success and resulted in cash handling at individual sites reducing. Uptake of parents / guardians using the online payments system in each of these schools was 90%.

Feedback from parents, Head teachers and school clerks stated that the system had

- reduced the amount of time they spent on cash handling
- improved relationships with parents / guardians as difficult conversations relating to non-payment of monies had reduced significantly
- the system was very easy to use and could be accessed from multiply sites
- provided full traceability of payments or any refunds made
- online statements detailing purchase history for individual customers
- full auditable
- instant communication with parents / guardians available via email automatic link
- parents had instant access to top up their child's accounts
- easier for transition days as the system is compatible with the current cashless catering solutions in Secondary's
- system fully automated including an excellent reporting system available to monitor on-line payments
- system is bilingual – multiple languages can be offered
- would not want the system removed due to the ease of use and the success with parents / guardians.
- reduction of the level of bad debt.

We worked closely with education finance, schools, governing body, audit, IT and central income (Corporate Finance) to capturing feedback of how the system benefited all parties.

The trial was successful in all areas that were evaluated. The evaluation of the project has enabled the 10 pilot schemes to be brought into the 21st century and has, changed our business and provides new revenue and value-producing opportunities to meet the demand and expectations of our 28,000 customers and we would now like to introduce this into the remaining 68 primary schools and update the 9 secondary schools.

## CONSULTATION

<b>7</b>	<p><b>Please outline the consultation / engagement process and outline any key findings.</b> <i>(Include method of consultation, objectives and target audience. What steps have been taken to ensure that people from various groups have been consulted during the development of this proposal? Have you referred to the Equalities Consultation and Monitoring Guidance?)</i></p> <p>A case study was undertaken by a school clerk based in Pengam and Fleur de Lys Primary of how cash was collected in their school. The objective of the case study identified how cash handling could be improved within their school for all users i.e. staff, pupils, parents, governing body and administration users.</p> <p>The feedback off the 10 primary schools that currently use the system from parents, Head teachers and school clerks stated that the system had</p> <ul style="list-style-type: none"><li>• reduced the amount of time they spent on cash handling</li><li>• improved relationships with parents / guardians as difficult conversations relating to non-payment of monies had reduced significantly</li><li>• the system was very easy to use and could be accessed from multiply sites</li><li>• provided full traceability of payments or any refunds made</li><li>• online statements detailing purchase history for individual customers</li><li>• full auditable</li><li>• instant communication with parents / guardians available via email automatic link</li><li>• parents had instant access to top up their child's accounts</li><li>• easier for transition days as the system is compatible with the current cashless catering solutions in Secondary's</li><li>• system fully automated including an excellent reporting system available to monitor on-line payments</li><li>• would not want the system removed due to the ease of use and the success with parents / guardians.</li></ul> <p>Equalities consultation and monitoring guidance was considered throughout the consultation and engagement process and all parties included in the consultation were happy that there were no gaps in the process that was undertaken.</p> <p>The following officers were also consulted alongside Senior Management Team of the authority.</p> <p>Steve Harris, Acting S151 Officer Sue Richards, Head of Education Planning &amp; Strategy Jane Southcombe, Financial Services Manager Clare Rogers, Business Development Manager Neil Rich, IT Development Officer Jess Thomas, Procurement Officer Matthew Death, IT Officer Deborah Gronow, Senior Audit Officer</p>
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If we are unable to implement this initiative we will need an alternative solution in Primary Schools as the manual entry system is at the end of its current lifespan, and is incompatible for other payment methods and is not supported by IT services. Failure to replace existing technology will result in an inability to process income payments worth over £1.4 million to the Authority.

## MONITORING AND REVIEW

<p><b>8</b></p>	<p><b>How will the proposal be monitored?</b>  <i>(What monitoring process has been set up to assess the extent that the service is being used by all sections of the community, or that the savings proposals are achieving the intended outcomes with no adverse impact? Are comments or complaints systems set up to record issues by Equalities category to be able analyse responses from particular groups?)</i></p> <p>A regular contractual monitoring meeting will take place in line with current procurement guidelines which will enable the authority to closely monitor the performance of the system, contractor and users i.e. monitor up-take, nutritional information, allergen requirements of individual pupils, debt management, user uptake and product sales etc.</p> <p>This monitoring process will ensure that the product is kept up to in line with our customers' needs.</p>
<p><b>9</b></p>	<p><b>How will the monitoring be evaluated?</b>  <i>(What methods will be used to ensure that the needs of all sections of the community are being met?)</i></p> <p>The system allows instant feedback from customers via automated survey which will be evaluated and acted as part of our internal quality management system.</p> <p>The system will also be monitored at our regular contract review meetings.</p> <p>Take up and usage figures will also be monitored.</p>
<p><b>10</b></p>	<p><b>Have any support / guidance / training requirements been identified?</b>  <i>(Has the EIA or consultation process shown a need for awareness raising amongst staff, or identified the need for Equalities or Welsh Language training of some sort?)</i></p> <p>19 schools will need no training as they currently have the system in place, however, 68 primary school clerks and catering staff will require training. This has been planned via webinars and train the trainer schemes (maintaining current guidance of 2 meter social distancing).</p>

	<p>Alongside the above all users of the system i.e. parents, pupils will need written guidance of simple step by step bilingual instructions of how to use the system. School clerks will be trained how to support parents / guardians who have no IT skills or equipment, internet connection or have additional learning needs.</p> <p>User manuals and YouTube videos are also available.</p>
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<p><b>11</b></p>	<p><b>If any adverse impact has been identified, please outline any mitigation action.</b></p> <p>Every child will be allowed an overdraft facility of 1 meal. This will prevent any child going without food. To support this action the system has an automated notification to all parents / guardians notifying them of when their account will require topping up.</p> <p>Schools will also have the ability to add additional funds to pupil's accounts in extreme cases to ensure that any vulnerable / safeguarding issues with individual pupils / families are able to managed by the Head teacher or nominated school representative.</p>
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<p><b>12</b></p>	<p><b>What wider use will you make of this Equality Impact Assessment?</b>  <i>(What use will you make of this document i.e. as a consultation response, appendix to approval reports, publicity etc. in addition to the mandatory action shown below?)</i></p> <p>This document will be included in any reports connected with cashless catering reviews, together with being publicised on CCBC website for members of the public to review and comment on.</p>
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<b>13</b>	<p><b>An equality impact assessment may have four possible outcomes, through more than one may apply to a single proposal. Please indicate the relevant outcome(s) of the impact assessment below.</b></p> <p style="text-align: right;"><b>Please tick as appropriate:</b></p> <p><b>No major change</b> – the impact assessment demonstrated that the proposal was robust; there was no potential for discrimination or adverse impact. All opportunities to promote equality have been taken. <span style="float: right;"><input checked="" type="checkbox"/></span></p> <p><b>Adjust the proposal</b> – the impact assessment identified potential problems or missed opportunities. The proposal was adjusted to remove barriers or better promote equality. <span style="float: right;"><input type="checkbox"/></span></p> <p><b>Continue the proposal</b> – the impact assessment identified the potential problems or missed opportunities to promote equality. The justification(s) for continuing with it have been clearly set out. (The justification must be included in the impact assessment and must be in line with the duty to have due regard. Compelling reasons will be needed for the most important relevant proposals.) <span style="float: right;"><input type="checkbox"/></span></p> <p><b>Stop and remove the proposal</b> – the impact assessment identified actual or potential unlawful discrimination. The proposal was stopped and removed, or changed. <span style="float: right;"><input type="checkbox"/></span></p>
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<b>Form completed by:</b>	
<b>Name:</b>	Marcia Lewis
<b>Job Title:</b>	Principal Officer Catering
<b>Date:</b>	28/07/20

<b>Head of Service Approval</b>	
<b>Name:</b>	
<b>Job Title:</b>	
<b>Signature:</b>	
<b>Date:</b>	