



Cyfarfod / Meeting

FFORWM CYLLIDEB YSGOLION
SCHOOLS FINANCE FORUM

Dyddiad ac Amser / Date and Time

9.00 a.m. DYDD MAWRTH, 25 MEHEFIN 2013

9.00 a.m. TUESDAY, 25 JUNE 2013

Lleoliad / Location

Ystafell Gyfarfod / Assembly Room
Hen Eglwys Santes Fair / Old St Mary's Church
Heol yr Eglwys / Church Street
TREMADOG

Pwynt Cyswllt / Contact Point

GLYNDA O'BRIEN

01341 424 301

Dosbarthwyd: 19.06.13

AELODAETH / MEMBERSHIP

AELODAU CABINET / CABINET MEMBERS

Y Cyngorydd/Cllr Sian Gwenllian (Addysg)

Y Cyngorydd/Cllr Peredur Jenkins (Adnoddau)

CYFARWYDDWYR CORFFORAETHOL / CORPORATE DIRECTORS

Mr Iwan Trefor Jones

Mr Dilwyn Williams

PENAETHIAID UWCHRADD / SECONDARY HEAD TEACHERS

Mr Alun Llwyd – Ysgol Dyffryn Ogwen

Mr Emyr Hughes - Ysgol Dyffryn Nantlle

Mr Eifion Jones - Ysgol Brynrefail

Mr Vaughan Williams - Ysgol Syr Hugh Owen

PENAETHIAID CYNRADD / PRIMARY HEAD TEACHERS

Mrs Iona Jones - Ysgol Edmwnd Prys/Bro Cynfal

Mr Gwyn Howells - Ysgol y Gelli

Mrs Sian Elen Pleming - Ysgol Llanaelhaearn

Mr Dylan Roberts - Ysgol Cymerau

Mrs Menna Wynn Pugh - Ysgol Penybryn

Mrs Esme Spencer - Ysgol Baladeulyn

UNDEBAU ATHRAWON / TEACHERS' UNIONS

Mr Neil Foden – Ysgol Friars

LLYWODRAETHWYR / GOVERNORS

Arfon

Mr Walter Williams – Ysgol Dyffryn Ogwen - Arennig, 14 Erw Las, Bethesda, Gwyedd

Mr Godfrey Northam - Ysgol Llanllechid – 4 Llwyn Bedw, Rachub, Llanllechid, Bangor, Gwynedd.

Meirionnydd

Mr Eifion Williams - Ysgol y Moelwyn – Tanrallt, Llan Ffestiniog, Blaenau Ffestiniog

Mr Gwynne Pierce - Ysgol Llanbedr – Bryn, Llanbedr, Gwynedd. LL45 2HW

Dwyfor

Mr Glyn Owen – Ysgol Uwchradd Botwnnog - Rhos Newydd, Mynytho, Pwllheli, LL53 7RW

Mr T. Elwyn Jones - Ysgol Bro Plenydd - Madryn, 30 Dolwar, Y Ffor

ESGOBAETH / DIOCESE

Parchedig/Rev Robert Townsend

YSGOLION EGLWYS / CHURCH SCHOOLS

Disgwyl enwebiad / Awaiting nomination

YSGOLION ARBENNIG / SPECIAL SCHOOLS

Mrs Donna Roberts - Ysgolion Hafod Lon a Pendalar

Sylwebyddion / Observers :

Mr Harry Thomas, Prif Weithredwr/Chief Executive

Mr Dewi R Jones, Pennaeth Addysg/Head of Education Service

Mr Owen Owens, Uwch Reolwr Addysg/Education Senior Manager

Mr Hefin Owen, Rheolwr Cyllid y Gyfadran Datblygu/Finance Manager Development Directorate

Mr Garem Jackson, Cadeirydd Ffederasiwn Penaethiaid Cynradd

Mrs Alwen Watkin, Cadeirydd Ffederasiwn Penaethiaid Uwchradd

A G E N D A

1. **Election of Chairman**

To elect a Chairman for the Forum for 2013/14.

2. **Election of Vice-Chairman**

To elect a Vice-Chairman for the Forum for 2013/14.

3. **Apologies**

Apologies for absence.

4. **Declaration of Personal Interest**

To receive any declaration of personal interest.

5. **Minutes**

To confirm the minutes of the meeting of the Forum held on the 4 February 2013.

(Copy enclosed – White Paper)

6. **Matters arising from the minutes**

- | | | | |
|-------|-----------|---|----------|
| (i) | item 3(a) | Review of Secondary Formula | (DRJ) |
| (ii) | item 5 | Financing Special Schools | (DRJ) |
| (iii) | item 6 | School Reorganisation - Distribution of Savings | (DRJ) |
| (iv) | item 7 | Review of the Funding Formula for Primary Schools | (DRJ/OO) |

7. **Final Accounts 2012/2013**

To present the Finance Manager's report – **green** paper (HO)

8. **School Effectiveness Grant SEG,**
Pupil Deprivation Grant PDG,
Welsh in Education Grant and Secondary Schools' Band 4/5 Grant

To present the Senior Education Manager's report – **lilac** paper (DM)

9. **Service Level Agreements :**

- Secondary Schools' Repairs & Maintenance (OO)
- Cognitive & Behavioural Team (DM)
- Integration (88 schools) (DM)
- Governors' Clerk (OO)

To present the Education Officer's report – **yellow** paper

10. **Increased Delegation**

To present the Finance Manager's report – **grey** paper (HO)

11. **Dates for the Schools Finance Forum for 2013/14**

13/11/2013 a 05/02/2014

SCHOOLS' BUDGET FORUM
Minutes of a meeting held at the Former St Mary's Church, Tremadog
on 4 February 2013 from 2.00 pm until 5.15 pm

Present:

Cabinet Members: Councillor Siân Gwenllian (Education)
Councillor Peredur Jenkins (Resources)

Corporate Directors: Mr Dilwyn Williams

School Heads: Mr R Emyr Hughes (Ysgol Dyffryn Nantlle), Mr Alun Llwyd (Ysgol Dyffryn Ogwen), Mr Gwyn Howells (Ysgol y Gelli), Mrs Sianelen Fleming (Ysgol Llanaelhaearn), Mrs Iona Jones (Ysgol Bro Cynfal/Edmwnd Prys), Mrs Esme Spencer (Ysgol Baladeulyn), Mr Dylan Roberts (Ysgol Cymerau).

Governors: Mr Walter Williams (Secondary Sector)
Mr Godfrey Northam (Primary Sector)
Mr Gwynne Pierce (Primary Sector)

Teachers' Unions Mr Neil Foden

The Diocese: Reverend Robert Townsend

Officers: Mr Dewi Jones (Head of Education)
Mr Hefin Owen (Development Finance Manager)
Mr Owen Owens (Senior Manager Education)
Mrs Glynda O'Brien (Members and Scrutiny Support Officer)

Apologies: Mr Harry Thomas (Chief Executive), Mr Iwan Trefor Jones (Corporate Director), Mr Ieuan Roberts (Head of Ysgol Pendalar), Mr Eifion Jones (Ysgol Brynrefail), Mr Vaughan Williams (Ysgol Syr Hugh Owen), Mrs Menna W. Pugh (Ysgol Penybryn, Tywyn), Mr Garem Jackson (Chair of Gwynedd Primary Head teachers Federation).

1. WELCOME

The Chairman extended a welcome to Mrs Iona Wyn Jones, Head of Bro Cynfal / Edmwnd Prys Schools to her first meeting of the Forum as a successor to Mrs Gwenan Williams who had retired from her post as Head of the above schools at the end of the year. The Members' and Scrutiny Support Officer was requested to send a word of thanks to Mrs Williams for her contribution and support to the Forum and to wish her well in her retirement.

2. MINUTES

The Chair signed the minutes of the meeting of the Schools' Budget Forum held on 26 November 2012 as a true record.

3. MATTERS ARISING FROM THE MINUTES

(a) Item 6 (a) – Reviewing the Secondary Formula

The Development Finance Manager reported that the Secondary Formula Review Group had agreed to meet as required and issues would be referred to the Group via the Secondary Strategic Planning process.

Resolved: To accept and note the above.

4. SCHOOLS BUDGET 2013/14

Submitted for information, the Corporate Director's report (DW) outlining a summary of research work undertaken by the Council's Research Unit on the comparative situation in terms of school expenditure in order to input the financial process.

It was noted that two factors could have an impact on expenditure per head on education, namely:

- (a) Density of population (schools in a rural area cost more because more are needed)
- (b) Deprivation (need to spend more on less privileged children if the same result is required)

In terms of population density in the primary sector, it was noted that Gwynedd was 3rd in Wales and 18th in terms of deprivation and therefore it was expected that expenditure per head should be between the 3rd and 18th rank in Wales.

In terms of the primary sector, as Gwynedd was in third position, bearing in mind the financial climate, it did not appear that there was an argument to adding to the investment at the moment.

Whilst recognising that the comparison in the secondary sector was not as good (as we were in 8th position), the need to keep an eye on the situation was noted considering the significant reduction forecast in demography from 2014/15 onwards. A sum of money was added for inclusion to the budget for 2013/14 yet it would be necessary to keep an eye on the situation and statistics next year and to come to further conclusions at the time regarding comparative investment.

In the context of special schools, it was noted that there were significant differences in the nature and scale of provision and the way that expenditure was recorded by authorities and therefore this made it more difficult to come to a specific conclusion.

Attention was drawn to recent data that indicated a difference of £605 per pupil between the expenditure in England and Wales on education and the conclusion was noted that the difference was not necessarily with schools. However, it would not be possible to make comparisons in future because of the changes in England and the establishment of academies outside the control of local authorities.

Resolved: To accept, note and thank the officer for the report.

5. FUNDING SPECIAL SCHOOLS

A report was presented that was commissioned from Mr John Roberts on funding special schools namely Ysgol Pendalar and Ysgol Hafod Lon.

(a) The Head of Education explained that the purpose of submitting the report was in order for the Cabinet Member for Education to receive the views of the Forum on the contents of the report prior to submitting a final report to the Cabinet regarding an additional financial allocation for the two schools in question.

The author of the report noted that there were dangers to compare the expenditure of Special Schools as it was not actually possible to compare like with like for various reasons such as arrangements to send pupils out of county, integration policies of pupils in mainstream schools, special residential schools in some authorities.

The author decided to focus on "Circular 58/90 published in 1990 by the Welsh Office at the time **"to propose guidance for Local Authorities and schools in addition to offering an illustrated staffing model ..."** i.e. offer a basis to identify the number of staff required for every pupil based on the pupil's learning difficulties.

Circular 58/90 stressed **"it follows that assessing staffing needs is a very complex matter. The attitude outlined in this circular should not be considered as a prepared plan but rather as a brief guidance for planning needs. The Secretary of State expects local authorities and schools to continue to form their own views regarding needs and this in light of local circumstances and priorities"**

The Head of Education added that no other guidance had been published since the above guidance and what is in the new arrival in terms of staffing since 1990 is;

- Requirements of Planning, Preparation and Assessment (PPA)
- Head teacher Time Management

To conclude, the Head of Education made reference to the suggestion of the report's author, namely that Gwynedd Council could consider increasing its financial investment to Special Schools mainly to increase a little of the staffing levels of schools and to calculate the impact of an illustrative staffing model as follows:

- | | |
|--|---------|
| • Additional cost to adopt a model for Ysgol Pendalar | £64,985 |
| • Additional cost to adopt a model for Ysgol Hafod Lon | £66,191 |

Total £131,176

(b) During the ensuing discussion the following responses were given to enquiries:

- (i) The Development Finance Manager confirmed that places in both schools were reviewed annually.
- (ii) In the context of the special units situated at Ysgol Cymerau and Bontnewydd, it was noted that the method of funding was a matter for discussion between the Special Schools and the local schools.
- (iii) It was disappointing that there was no representative present from the Special Schools on the Forum in order to receive the input of those schools
- (iv) It was trusted that it would be possible to proceed with the Council's aspiration to revise the current provision at Ysgol Hafod Lon and create an

excellence centre for Special Educational Needs centrally in the County in order to rationalise the provision for pupils currently located out of county.

(c) The Cabinet Member reported that they had received an apology from the Head teachers of the Special Schools for their absence and they had requested feedback of what the Forum resolved.

In response, the Head of Education confirmed that the officers would give feedback to the Head teachers in order that they may report back to the Governors.

Resolved: (a) To accept and note the contents of the independent report.

(b) To request that the Cabinet Member conveys to the Cabinet the Forum's unanimous approval of the recommendations by the report's author namely to invest:

- (i) an additional £64,985 for Ysgol Pendalar; and**
- (ii) an additional £66,191 for Ysgol Hafod Lon.**

6. CONSULTATION ON THE DISTRIBUTION OF SCHOOL ORGANISATION SAVINGS

A consultation letter was submitted that was sent to the Head teachers and Chairs of Governors of the County's Primary Schools based on the Council's resolutions to close schools in the Tywyn and Berwyn catchment areas and the possibility of releasing £200,000 of the savings operational from 1 September 2013 to the 98 Primary Schools that will exist in Gwynedd at that time.

The following two options were consulted upon:

Option 1

- A Distribute £98,000 by removing the line "KS2 Scheme to support large classes" that distributes £1,000 to every school in order to remove the contribution (this will not reduce the budget to support large classes)**
- B Distribute £102,000 on the basis of the number of pupils (via the heading services and supplies)**

Option 2

- A Distribute £98,000 by removing the line "KS2 Scheme to support large classes" that distributes £1,000 to every school in order to remove the contribution (this will not reduce the budget to support large classes)**
- B Distribute £102,000 on the grounds of the number of pupils who are entitled to free school meals (via the Additional Learning Needs and Deprivation heading)**

A response was received from 33 schools out of 102 with 14 in favour of Option 1, 18 in favour of Option 2 and 1 objection.

The Head of Bro Cynfal/Edmwnd Prys stated that she had returned the form expressing her support to Option 1, yet this had not been noted on the summary list submitted to Members during the meeting.

The Corporate Director stated that the response from the schools was disappointing and he was of the opinion that the children who did not get the same opportunities as children from more privileged backgrounds should be targeted. He supported Option 2, and at the same time suggested that research should be commissioned on how much money should be directed in order to ensure a due amount to the density of the children who need it, also bearing in mind that the Deprivation Grant is likely to end in the future.

The Cabinet Member stressed that she was anxious to see more resources directed to pupils from deprived backgrounds in order to close the gap that exists in terms of attainment in pupil performance. By distributing additional finance towards this it would be possible to see what plans would close the gap. Also, perhaps a more general term should be used such as 'children in need' as often those children who are designated as 'children who receive free school meals' are not necessarily in need of additional support.

Concerns were expressed by some Members to implement Option 2 on the grounds:

- (a) That the free school meals indicator was not dependable
- (b) That some schools had significant balances and would it not be possible to exempt those schools from receiving the additional allocation and direct the Heads to submit a report on the use of the additional funding.

In response, the Development Finance Manager explained that it was necessary to implement devolved funding in accordance with the relevant legislation and that it would not be possible to place a condition on the use of the additional funding or to refer to balances.

Following a vote it was:

Resolved: To approve Option 2 to distribute the £200,000 of the savings in the schools re-organisation field in the catchment areas of Tywyn and Berwyn which will be implemented on 1 September 2013 to the 98 primary schools that will exist in Gwynedd at the time as follows:

- (i) **Distribute £98,000 by removing the line "KS2 Scheme to support large classes" that distributes £1,000 to every school in order to remove the contribution. (This will not reduce the budget to support large classes)**
- (ii) **Distribute £102,000 on the grounds of the number of pupils who are entitled to free school meals (via the Additional Learning Needs and Deprivation heading)**

7. REVIEW OF THE PRIMARY SCHOOLS' ALLOCATION FORMULA

Submitted the report of the Head of Education stemming from a consultation on a review of the primary schools allocation formula and to receive the views of schools on the principles established by the Primary Formula Review Group to create a revised allocation formula.

The Head of Education reported that a response had been received from 40 individual schools and reference was made to the summary attached to the report as Appendix 1. The Forum was requested to consider the responses before reaching an opinion that would be submitted to the Cabinet Member for Education.

The Cabinet Member for Education added that the Working Group of Heads had discussed the formula with Mr John Roberts, external expert, and had reached a consensus of opinion that the principle to change the allocation formula was accepted. Unfortunately, the change in the formula meant that some schools would lose money whilst others would gain. Whilst accepting that some schools would lose money, the money distributed as a result of the savings to re-organise primary schools would alleviate some of the loss.

During the ensuing discussion, the following points were highlighted by individual Head teachers:

- (a) disappointment that only 40 schools had responded to the consultation
- (b) whilst supporting the principle of reviewing the formula, an example was given of one school who had seen a financial reduction of nearly £20,000 which was an excessive reduction to face in one financial year. If the proposed formula was implemented then consideration should be given to revise it over a period of two years in order to alleviate any impact over a longer period.
- (c) The headings of Assistants and Teachers Allowances should be included separately
- (d) Whilst accepting that the proposed formula was fairer to larger schools, however, there was not enough finance in the pot and the expenditure on education would have to be increased.
- (e) The supervision time was insufficient to fund an hour a day throughout the year.
- (f) Lack of a heading for the requirements of the Foundation Phase

Regarding the comment about insufficient finance in the pot – the Corporate Director noted that this was not what the evidence referred to in the previous item suggested and it was a matter of the use made of the available resource that was the problem.

Resolved: (a) To accept and note the contents of the report.

(b) Present to the Cabinet Member:

- (i) the approval of the Schools' Budget Forum to the principle of the primary schools allocation formula taking into consideration the observations noted above.**
- (ii) support to proceed to implement it over a period of two years.**

8. SCHOOL BALANCES

A letter was submitted that had been sent to Head teachers and the Chairs of Governors in all Gwynedd schools regarding the use of balances.

Members were reminded of the legislation where the Authority had the right to instruct the governing body regarding how to spend the surplus in the school balance-sheet for a financial period, if:

- (i) in the case of a primary school that the balance was £50,000 or more, and
- (ii) in the case of a secondary school or special school that the balance was £100,000 or more;

and that the Forum had resolved to include the following clause:

- (a) In the case of a primary school, where the balance was more than 8% of the proportion of the school's budget or £50,000 or more, whichever is the greatest. . . "

- (b) In the case of a secondary school, where the balance was more than 8% of the proportion of the school's budget or £100,000 or more, whichever is the greatest"

The Head of Education made reference to the discussion and the observations made at the last Forum meeting and stemming from the minute he had consulted regarding the Forum's wish to remove the 8% threshold.

A handout was submitted to members with some of the responses received from schools (14 primary and 4 secondary) and it was noted from those who responded that 8 schools were willing to remove the 8% and 7 schools wished to retain the 8% clause.

The Development Finance Manager guided Members through a list of all school balances and drew attention to a rough estimate by the Development Finance Unit for 31.03.13.

The Head noted that he supported the retention of the 8% or £50,000 clause (in the case of primary schools) and £100,000 (in the case of a secondary and special schools) whichever was the lowest,

Several Heads highlighted a concern regarding those schools that carry substantial balances and are part of a security scheme by the authority because of the low number of pupils. It was felt that it was not possible for small schools to be able to invest in staff and that it was a challenge for the Heads to be able to spend the rest of the balances. It was seen that the same schools carried balances year after year. It was added that the matter should be considered as part of the Head teachers self-evaluation process.

It was suggested if it was possible for officers to check the security policy in order to give serious consideration to remove the security element of those schools with substantial balances and that they were therefore self financing by using balances.

Resolved: To request the officers to consider if it was possible to change the security policy in order not to implement it in situations where a school has significant balances.

9. PROPERTY SERVICE LEVEL AGREEMENT

Submitted (i) Service Level Agreement - Maintenance of Primary School Buildings

(ii) To Members during the meeting, the Service Level Agreement – Maintenance of Secondary School Buildings 2013 – March 2016.

(A) Service Level Agreement – Maintenance of Primary School buildings

The Senior Education Manager guided Members through the report regarding the Service Level Agreement in the primary sector and noted that points 3, 4 and 5 addressed the discontent of schools with the previous Service Level Agreement. He was of the view that the Agreement was more straightforward with a page table instead of a very long list. Reference was made to the change in responsibilities namely that the Council now took responsibility for funding the removal of asbestos from floors when schools wish to install new floors.

During the ensuing discussion the following points were highlighted:

(a) there was astonishment that schools were responsible for fences, walls and gates and there was concern that if schools had no money for their repair what would happen in terms of the health and safety of the pupils.

In response, the Senior Education Manager explained that if it was an urgent and emergency matter then terms would have to be agreed. However, they should be maintained to an acceptable condition firstly in order that they do not deteriorate.

(b) It was asked what would happen in flooding situations when fences/walls would be destroyed and water went through the school.

The Corporate Director explained that insurance would address situations similar to the above.

Resolved: Accept the Service Level Agreement – Maintenance of Primary School Buildings April 2013 – March 2016.

(B) Service Level Agreement – Maintenance of Secondary School Buildings

The Senior Education Manager guided Members through the Agreement and drew attention to the attached list to the Agreement as Appendix B and noted that the schools were responsible for any matter that had not been noted on that list.

A Head teacher expressed his discontent to accept the Agreement as he had not had time to give deserving attention to the contents since he had just received it and it was suggested that consideration of the document should be deferred until the next meeting in June. A Sub Group of Head teachers had discussed the principles of the agreement, however, further discussion was required on issues such as work above the financial threshold and who was responsible for the cost. Did it mean that Head teachers would have to request three quotations from contractors which entailed a bureaucratic administrative burden?

The Corporate Director asked why a document was required and would not a system of devolving funding and trusting the authority to deal with maintenance responsibilities be more effective. He was of the view that the above system was a waste of the time of Head teachers and staff by having to discuss who was responsible for different aspects of the maintenance work.

Resolved: To defer making a resolution regarding the Service Level Agreement – Maintenance of Secondary School Buildings and submit further to the next meeting of the Forum on 25 June 2013 in order that the Head teachers could give deserving attention to the contents.

10. SERVICE LEVEL AGREEMENT RSEIS (North Wales Regional School Effectiveness and Improvement Service)

The Head of Education made reference to the above Service Level Agreement which was an agreement for the 6 authorities (Gwynedd, Anglesey, Conwy, Denbighshire, Flintshire and Wrexham) and a discussion was on-going and this was based on understanding what the school improvement service offered. However, the discussion had been rather frustrating as a Chief Officer had not been appointed for RSEIS.

It was noted that the Service Level Agreement between the Authority and RSEIS was based on a full business case submitted to the Cabinet of the six authorities.

The structure of RSEIS was explained namely a team of 30 System Leaders under the care of the Chief Officer and 3 Senior System Leaders, one responsible for Anglesey/Gwynedd, one for Denbighshire/Conwy and one for Flintshire/Wrexham. Under every 3 Senior System Leader there were 3 Sub-teams that achieve the main duties and the 6 days are allocated to schools that include 3 visits with visits and additional assistance as required.

The following 4 points were proposed for consideration as a way forward on the basis of the above situation:

1. To operate completely transparently with schools and offer the same service level agreement as discussed with RSEIS to schools.
2. That the Authority and the schools accept that this Service Level Agreement would be operational for 2013/14 and a request was made for a contribution from school budgets on the same basis as the principle of this year's Agreement and in the past with CYNNAL.
3. Establish a Sub-group of Primary, Secondary and Special Schools Head teachers to look in detail at the nature of the Service Level Agreement during 2013/14.
4. Information would be sent to the Heads of all the ancillary administrative arrangements that CYNNAL used to organise for schools. The Authority would have to supply these elements through grants.

A nervousness was highlighted amongst Head teachers regarding the establishment of the above and concern was noted regarding the right and entitlement arrangements, discussion on core subjects, continuous professional development and disparities across north Wales.

In response to alleviating the concerns of Head teachers, the Head of Education gave an assurance:

- (a) That the sub-group of Head teachers appointed would look in detail at the Service Level Agreement and could identify the appropriate levels to be purchased/or otherwise to form the 2014/15 Service Level Agreement.
- (b) Where a need was identified in schools, naturally more would have to be targeted.
- (c) In service training would continue and opportunities would be available but not to the scale of right and entitlement
- (ch) That the same pattern would be adhered to and on the basis of the same finance as implemented last year.

Resolved: To approve that the Head of Education proceeds as outlined in 1 – 4 above.

10. SCHOOLS EFFECTIVENESS GRANT AND THE PUPILS' DEPRIVATION GRANT

The Head of Education reported that the growth in the Schools Effectiveness Grant at a national level from £32.5m to £37.5m with a growth in the gross allocation for Gwynedd from £1.4m to £1.6m, meant an increase of £200,000. Further growth in the grant was anticipated for 2014/15. A request would be made for the grant on a regional basis as part of the application of the 6 authorities.

The Pupils' Deprivation Grant would be targeted directly.

Resolved: To accept and note the above information.

11. DATE OF NEXT MEETING

It was reported that the next meeting would take place on Tuesday 25 June 2013 at 9.00 until 12.00 at the Former St Mary's Church, Tremadog.

Resolved: To accept and note the above.

CHAIRMAN

MEETING	SCHOOLS BUDGET FORUM
DATE	25 June 2013
TITLE	Schools Final Accounts 2012/13
PURPOSE	To present the accounts and comment on the balances and monitoring arrangements
RECOMMENDATION	To approve the report and approve further implementation as required
REPORT BY	Dewi R Jones, Head of Education
CABINET MEMBER FOR EDUCATION	Cllr Sian Gwenllian

The information sent to schools (letter and appendices 1-5) is attached, specifying the balances or deficits on 31/03/2013 of all Gwynedd's schools.

Gwynedd school balances have reduced by £624,303 during 2012/13 to £3,813,317.

12 schools have a deficit at the end of 2012/13 that ranges from between £564 and £181,017

The procedures and time-table are outlined where schools report to the Head of Education, in accordance with the Funding Scheme, if balances exceed 5% . In situations where primary balances exceed £50,000 and also exceed 8% and in the secondary and special sector that there are balances of over £100,000 and also over 8%, the Head of Education's powers to direct a Governing Body on how to spend an element of their balances, is noted. Failure to act as directed would lead to having to pay the money back to the Education Service.

At the Forum meeting held on 04/02/2013, the estimated schools balances by the end of the financial year was reported upon. Between setting the budget for 2012/13 and the end of the financial year, school balances exceed the original estimate by £1,398,796 It is intended to target some schools to identify and understand the reasons for the increased balances during the financial year and report on the findings to the Forum meeting during the Autumn term.

Pennaeth Addysg Head of Education

Dewi R Jones

Gofynnwch am/Ask for:

Mr Hefin Owen ☎(01286) 679061

✉ hefinowen@gwynedd.gov.uk

Mrs Kathy Bell ☎(01286) 679449

✉ kathybell@gwynedd.gov.uk

Mr Gwyn Owen ☎(01286) 679561

✉ gwynowen@gwynedd.gov.uk

Ffacs 📠(01286) 677347

Ein Cyf / Our Ref: cyfterf2012/13 KB

School Headteachers

20 June 2013

Dear Headteacher

A) SCHOOL ACCOUNTS

Final Accounts for Financial Year 2012/13

The final accounts for 2012/13 have been completed and you will already have received a statement indicating the total available resources and true net expenditure (including interest) for the year. For primary schools, the statement shows budget and true expenditure for each budget heading. The secondary and special schools provide their own reports of FMS system.

Overspend at the end of 2012/13

It is a statutory requirement for schools who have a deficit at the end of the financial year to provide the LEA with details of their financial strategy so as to clear this deficit. It would be appreciated if you would please send me a letter providing a summary of the situation **by 5 July 2013**. There are 9 primary schools, 2 secondary schools and 1 special school who over-spend at the end of 2012/13.

B) SCHOOL BALANCES 31/03/2013

As you will be aware, school balances have been regularly and increasingly discussed over recent years by headteachers, Governors, Councillors etc. Gwynedd schools had the highest percentage of balances in Wales at the end of 2011/12 standing at *5.9% (see my letter dated 24 January 2013 - **Appendix 1**).

An enquiry was received from the Minister for Education on 12 February 2013 - see **Appendix 2** that also includes the Cabinet Member for Education's response.

Here is a summary of school balances on 31/03/2013 -

	percentage	31/03/2012	increase/reduction	31/03/2013	percentage
Primary	7.53%	£2,309,098	+ £34,767	£2,343,865	6.68%
Secondary	6.06%	£2,059,415	- £586,048	£1,473,367	4.31%
Special	2.57%	£69,107	- £73,022	- £3,915	-0.20%
Total	*6.59%	£4,437,620	- £624,303	£3,813,317	5.35%

(* The Assembly uses a different basis to calculate school balances)

Swyddfa'r Cyngor
Caernarfon
Gwynedd LL55 1SH
01766 771000
www.gwynedd.gov.uk

There is a substantial reduction in the secondary and special sector balances, but an increase in the primary sector.

A spreadsheet is appended detailing the situation of each individual school (**Appendix 3**).

You will be aware that the Schools Funding Regulations legislation (Wales) 2010 that has been implemented since 1 April 2011, that gives an LEA powers when a surplus after setting a budget exceeds the threshold of £50,000 in the primary sector or £100,000 in the secondary and special sectors.

The Council Board has also decided to exceed the £50,000/£100,000 threshold and use the 8% of the allocation – or whichever is the greatest. The Schools Budget Forum will review this at their meeting held on 25/06/2013.

The following procedure will be implemented regarding balances in Gwynedd schools this year -

1. Balances of over 5% (Schools Funding Scheme)

To comply with Schools Funding Scheme (clause 4.2) there is a statutory requirement on schools who have balances of over 5% of their allocation to report to the LEA on the use that the school intends to make of the balances (it is expected that the Governing Body has agreed on the school's response to the questionnaire).

65 primary schools and 8 secondary schools have balances in excess of 5% at the end of 2012/13.

A questionnaire is appended (**Appendix 4**) for you to respond to the enquiry – if applicable.

Time-table – questionnaire to be returned to the Development Finance Unit by no later than 5 July 2013

2. Budget for 2013/14

Education Department and Finance Department Officers to review school budgets for 2013/14 (that should have been established by the full Governing Body by 31 May 2013) to identify the uncommitted balances element in the budget and calculate the element that exceeds the threshold.

Time-table – by the end of term

3. Direct Governing Body

Following a detailed review of matters 1 and 2, if appropriate, I will direct the Governing Body which has balances above the threshold how to spend an element of their balances and request confirmation that they will act in accordance with the instruction.

I will also contact schools which have balances in excess of 5%, but under the threshold, if the questionnaire on use of balances is unclear and/or that the reasons offered are unacceptable or vague.

Time-table – implement in September 2013

4. Surplus payment to the LEA

Review the schools revised budget by November 2013 and unless the Governing Body acts in compliance with the guidance, I will notify them of the appropriate amount that I will transfer from the school budget to the schools budget during the financial year 2013/14.

Time-table – implement during the period December 2013 to March 2014.

C) SCHOOL ACCOUNTS MONITORING

Increase in balances having set budget for 2012/13

A report was presented to the Schools Budget Forum 04/02/2013 to highlight use of balances when establishing the budget for 2012/13, an initial projection of balances on 31 March 2013, as well as a review of the budget during the year. By now, we are aware of the actual situation (**Appendix 5**), and a summary is provided below -

	balances 31/03/2012	Use when setting a budget 2012/13	OBJECTIVE 1 balances 31/03/2013	OBJECTIVE 2 balances 31/03/2013	TRUE balances 31/03/2013
primary	£2,309,098	£969,851	£1,339,247	£2,252,000	£2,343,865
secondary	£2,059,415	£984,064	£1,075,351	£1,257,490	£1,473,367
special	£69,107	£0	-£77	-£45,000	-£3,915
Total	£4,437,620	£1,953,915	£2,414,521	£3,464,490	£3,813,317

- **OBJECTIVE 1** – When setting the budget for 2012/13, the schools state that they commit £1,953,915 of balances when setting the budget, that leads to an initial projection that balances reduce to **£2,414,521** at the end of the financial year.
- **OBJECTIVE 2** – A review held during the year provides revised projected balances of £3,464,490 that is **£1,049,969 above** compared to the time when the budget was set up.
- **TRUE** – The true situation indicates balances of £3,813,317 that is **£1,398,796 above** the estimate. (OBJECTIVE 1) .

It is intended to target certain schools to identify and understand the reasons for the increase in unplanned balances during the year. Secondary schools with an increase of

over £75k and primary schools with an increase of over £40k are targeted. Education Officers and Development Finance Unit staff will investigate with the following schools during the Summer -

secondary schools	primary schools
Eifionydd	Tregarth
Botwnnog	Llandygai
Glan Y Môr	Penybryn, Tywyn
Tryfan	Maesincla

and report to the Forum on their findings at the meeting held on 13 November 2013.

May I remind you of the general concern that persists that some schools do not always make best use of the available finance for the children who are currently in the educational system, this matter has been highlighted by the Cabinet Member for Education.

A report on school final accounts and balances will be presented to the Schools Budget Forum on 25/06/2013.

Yours sincerely,

Dewi R Jones

Dewi R Jones
Head of Education

Pennaeth Addysg Head of Education

Dewi R. Jones

Appendix 1

Gofynnwch am/Ask for: **Dewi R Jones**
☎ (01286) 679467 Ein Cyf / Our Ref: **DRJ/AAS**
📄 (01286) 677347 Eich Cyf / Your Ref:
✉ dewirjones@gwynedd.gov.uk

24 January 2013

To headteachers and chairpersons of governing bodies of all schools in Gwynedd

Dear Headteacher/Chair of Governors

Re: School Balances

At the last meeting of the Schools Budget Forum held on 26 November 2012, a detailed discussion was again held on the issue of the comparatively high balances of schools in Gwynedd.

Forum members clearly expressed the wish that the financial resources should be spent for the benefit of the schools' current pupils rather than carry over balances just for its own sake. Everybody understands the need for careful future planning, and that is fully appreciated, but it seems that the currently available funding in the Education system is not being put to best use.

The Cabinet Member for Education mentions that the high level of balances makes it difficult for schools to receive additional funding or receive lower cut-backs than the other Council services.

In addition, I have been asked to release several documents that are linked to this matter:

1. A recent statement by the Welsh Government on school balances where it is mentioned that Gwynedd Schools have the highest balances in Wales
"Gwynedd, with 5.9%, had the highest level of reserve funds as a percentage of the expenditure that is delegated to schools"
<http://wales.gov.uk/topics/statistics/headlines/localgov2012/121024/?skip=1&lang=cy>
2. List of School balances based on pupil numbers (**Appendix A**)
3. School balances based on pupil numbers who are eligible for free meals (**Appendix B**)
4. Revised budget for 2012/13 drawing comparison between the schools situation and the original estimate on the use of balances when setting budget for 2012/13 (**Appendix C**)
5. School Balances Questionnaire for 2011/2012 noting the intention of all schools with balances greater than 5%

Each school is welcome to provide comments for me on the response form, and I will present further comments at the next meeting of the Schools Budget Forum to be held on 4 February 2013. (**Appendix Ch**)

You may recall that we held a consultation on an amendment to the documentation where the LA is entitled to intervene with school balances. The background is that at their meeting held on 5 July 2011, the Schools Budget Forum agreed to add the 8% clause to the legislation. The Forum now wishes to consider deletion of this clause and this will be discussed at the next Forum meeting to be held on 4 February 2013. In the meantime, you are provided with an opportunity to express an opinion on this matter and a response form for this purpose is also enclosed. (**Appendix D**).

Yours sincerely

Dewi R Jones

Dewi R Jones
Head of Education

Copy: Education Department's Management Team

Swyddfa'r Cyngor
Caernarfon
Gwynedd LL55 1SH
01766 771000
www.gwynedd.gov.uk

Parch • Gwasanaethu • Positif • Gweithio fel tîm • Gwerth am arian
Respect • Serving • Positive • Working as a team • Value for money

Leighton Andrews AC / AM
Y Gweinidog Addysg a Sgiliau
Minister for Education and Skills



Llywodraeth Cymru
Welsh Government

Eich cyf/Your ref
Ein cyf/Our ref

Education Cabinet Members in
Wales

12 February 2013

Dear Education Cabinet Members

I would like to bring to your attention the current position regarding the level of surplus budgets held by schools in Wales.

The levels of surplus budgets have tended to fluctuate over recent years, but they have remained at consistently high levels.

Statistical bulletin 177/2012, (released on 24 October 2012 by the Welsh Government's Statistical Directorate), shows that the level of reserves held by schools in Wales at 31 March 2012 was £67 million, or the equivalent of £149 per pupil. Whilst this represents a decrease of 9% from the previous year (when the levels were £74 million), I am concerned that this is still too high.

The School Funding (Wales) Regulations 2010 introduced provisions allowing local authorities to take action when school surplus balances reach certain levels. When surplus budgets held by schools exceed £50k for primary schools or £100k for secondary and special schools, authorities can direct schools to spend surpluses. If a governing body does not comply with such a direction, authorities may recover all or part of that surplus and allocate it to the authority's schools budget to be recycled for education in whatever way the authority sees fit.

There will of course, be certain circumstances where schools will have acceptable reasons to hold excessive surplus balances. For example, where expenditure has been set aside for a specific purpose and will be spent within a defined timescale. As long as the school has a robust plan to support this, they should be allowed to use the surplus for that purpose. However, if schools do not have plans that stand up to scrutiny, authorities should be taking action to reduce those schools' surplus budgets. Excessive surplus balances are not good budget management.

I am aware that some authorities are taking appropriate action and working with their schools to reduce surplus budgets. However, some authorities are not and this needs to be addressed. Local authorities should all be working to address this issue; and should be sharing the good practice of the most proactive local authorities for the benefit of all areas across Wales.

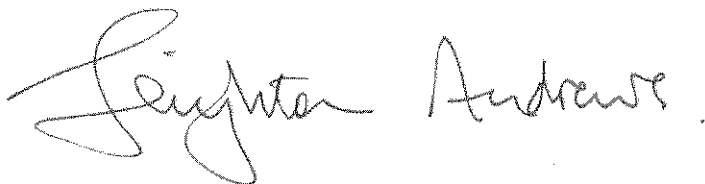
Some local authorities have commented that the provisions within the School Funding (Wales) Regulations 2010, to take action on school surplus budgets would benefit from either adjusting the monetary limits or including a percentage figure as well as monetary limits. We are considering revising the regulations to ensure that the provision is fit for purpose for all schools. However, in the meantime authorities should be taking action as the provision allows.

I would urge you to discuss this issue with your Directors of Education and ensure that you are clear in respect of what they are doing to reduce surplus budgets in schools within their area. From these discussions you should be clear what plans your authority have in place; and, within what timescales they expect to see improvements.

I would appreciate it if you could provide feedback from these discussions with Directors of Education to Steve Vincent, Deputy Director Schools Management & Effectiveness Division by the end of the financial year.

I must advise that if the situation does not improve or I am not convinced that you are taking the necessary action then I will take advice as to whether I can use the Welsh Ministers' intervention powers and direct authorities to take appropriate action to reduce school surplus budgets.

I am sending a copy of this letter to all Council Leaders in Wales.

A handwritten signature in black ink that reads "Leighton Andrews". The signature is written in a cursive style with a large initial 'L'.

Leighton Andrews AC / AM
Y Gweinidog Addysg a Sgiliau
Minister for Education and Skills

Dirprwy Arweinydd y Cyngor • Deputy Council Leader
Aelod Cabinet dros Addysg a Phlant a Phobl Ifanc •
Cabinet Member for Education and Children & Young People
Cynghorydd / Councillor Sian Gwenllian



Gofynnwch am/Ask for: **Cyng. Sian Gwenllian**
☎ (01286) 679162
✉ Cynghorydd.SianGwenllian@gwynedd.gov.uk

Ein Cyf / Our Ref: **SG/lS**
Eich Cyf / Your Ref:

8 April 2013

Steve Vincent
Deputy Director
Schools Management and Effectiveness Sub-department
Welsh Assembly Government
Cardiff Bay
CARDIFF
CF99 1NA

Dear Steve Vincent

Re: School surplus reserves in Wales

I wish to acknowledge receipt of a letter dated 12 February 2013 from the Minister for Education on the above mentioned matter and present the following comments regarding his request.

I accept the comments made by the Minister for Education and Skills namely that total balances of some schools in Wales as at 31 March 2012 were too high and LEA's need to work with their schools to address this.

I also fully recognize that Gwynedd Schools had the highest percentage of school balances on average in Wales and I note that this matter receives detailed focus from the Schools Budget Forum and that I have already expressed my dissatisfaction about this situation to the Forum.

A clear implementation procedure has recently been established where the Education Department targets schools who have unallocated balances that exceed a specific threshold and review/challenge schemes that refer to use of these balances whilst also considering whether schools require further guidance on spending – enclosed for your information is a copy of a letter from the Head of Education to our schools outlining the current measures being taken in Gwynedd.

I have also forewarned the Schools Budget Forum **that unless there is sufficient progress on this matter, that the implementation measures will be reviewed and tightened up.**

I also support the intention to review the funding regulations.

Yours sincerely,

Cllr. Sian Gwenllian
Deputy Leader of the Council and
Cabinet member for Education and Children and Young People

Copy: Dyfed Edwards, Leader Gwynedd Council
Dilwyn Williams, Corporate Director
Hefin Owen, Finance Manager
Dewi R Jones, Head of Education
Owen Owens, Senior Manager Education

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Balansau Ysgolion 31 Mawrth 2013 /
School Balances 31 March 2013patrwm balansau dros 4 mlynedd /
pattern of balances over 4 years

	Rhif Ysgol School No	Enw Ysgol / School Name	Dyranriad Terfynol / Final Allocation 2013/14	Balansau / Balances 31/03/2013	Balansau fel % o'r Dyranriad / Balances as a % of Allocation	Balansau / Balances 31/03/2010	Balansau / Balances 31/03/2011	Balansau / Balances 31/03/2012	Balansau / Balances 31/03/2013	
	1	2000	Gwaun Gynfi	547,274	40,986	7.49%	5,147	32,412	46,115	40,986
	2	2004	Nefyn	432,064	40,787	9.44%	69,618	64,356	54,500	40,787
	3	2006	Llanrug	719,641	-7,324	-1.02%	-5,384	-11,050	-7,949	-7,324
	4	2008	Abererch	239,375	13,384	5.59%	7,390	6,143	6,448	13,384
*	5	2009	Abersoch	154,736	20,741	13.40%	-2,333	10,264	5,720	20,741
*	6	2010	Beddgelert	165,895	17,317	10.44%	11,764	20,602	22,741	17,317
	7	2011	Bethel	461,917	-14,380	-3.11%	41,934	23,010	11,978	-14,380
	8	2013	Bodfeurig	197,799	31,914	16.13%	38,464	47,789	42,207	31,914
	9	2015	Borthygest	200,798	5,378	2.68%	12,312	499	5,441	5,378
*	10	2016	Bronyfoel	203,463	32,050	15.75%	20,417	20,627	29,399	32,050
	11	2017	Brynaerau	229,328	10,825	4.72%	15,530	22,251	11,902	10,825
	12	2024	Carmel	189,005	19,832	10.49%	17,973	14,421	23,779	19,832
	13	2026	Y Gelli	622,164	39,515	6.35%	84,849	87,373	59,679	39,515
	14	2028	Penybryn	422,183	31,023	7.35%	67,900	60,374	23,148	31,023
	15	2033	Treferythyr	362,290	45,096	12.45%	64,524	52,037	65,997	45,096
	16	2035	Cwm Y Glo	218,983	25,914	11.83%	28,836	16,477	5,356	25,914
	17	2036	Chwilog	199,955	-1,188	-0.59%	-4,345	1,733	507	-1,188
	18	2039	Crud Y Werin	206,067	11,277	5.47%	12,363	6,767	9,369	11,277
	19	2042	Dolbadarn	547,586	35,205	6.43%	36,030	27,105	41,940	35,205
	20	2046	Edern	259,128	5,053	1.95%	15,263	15,565	13,597	5,053
*	21	2047	Felinwnda	156,676	10,451	6.67%	20,139	19,468	15,347	10,451
	22	2048	Bro Plennydd	258,935	5,393	2.08%	14,000	8,179	9,055	5,393
	23	2049	Garndolbenmaen	209,078	9,952	4.76%	6,009	10,843	16,988	9,952
	24	2051	Glanadda	209,751	24,147	11.51%	59,433	42,050	28,147	24,147
	25	2057	Groeslon	306,941	37,036	12.07%	41,843	54,011	41,254	37,036
*	26	2059	Llanaelhaearn	174,819	-2,306	-1.32%	13,569	9,605	1,125	-2,306
	27	2060	Llanbedrog	222,800	6,955	3.12%	10,803	13,513	16,295	6,955
	28	2066	Llangybi	286,637	13,977	4.88%	-1,841	-2,167	11,330	13,977
	29	2069	Llanllechid	838,611	47,858	5.71%	74,736	82,078	86,109	47,858
	30	2070	Llanllyfni	323,789	47,628	14.71%	48,829	23,378	27,638	47,628
*	31	2071	Llidiardau	127,140	1,872	1.47%	5,676	10,511	5,319	1,872
	32	2075	Bab Morfa Nefyn	161,008	21,036	13.07%	42,861	29,751	33,557	21,036
*	33	2078	Baladeulyn	179,411	713	0.40%	3,331	10,489	1,746	713
*	34	2081	Nebo	153,125	21,829	14.26%	18,421	17,550	9,990	21,829
	35	2085	Penisarwaen	202,056	20,369	10.08%	15,093	13,706	22,490	20,369
	36	2089	Bro Llleu	549,111	42,569	7.75%	55,059	52,201	39,248	42,569
	37	2093	Pentreuchaf	334,836	16,529	4.94%	45,694	27,945	23,419	16,529
*	38	2097	Rhiwlas	201,432	-3,813	-1.89%	14,001	6,248	-9,576	-3,813
*	39	2098	Rhosgadfan	178,587	-564	-0.32%	14,760	11,416	1,524	-564
	40	2099	Rhostryfan	218,347	-5,758	-2.64%	2,679	11,000	-6,564	-5,758
	41	2103	Sarn Bach	218,654	36,917	16.88%	8,273	11,658	16,573	36,917
	42	2104	Eifion Wyn	725,773	34,524	4.76%	33,500	42,057	26,173	34,524
	43	2108	Talysarn	279,180	27,321	9.79%	25,666	21,404	25,634	27,321
	44	2110	Y Gorlan	327,763	7,335	2.24%	3,995	19,229	6,645	7,335
	45	2111	Yr Eifl	187,199	1,365	0.73%	3,689	641	4,266	1,365
*	46	2112	Tudweiliog	165,350	953	0.58%	5,775	19,644	12,236	953
	47	2113	Waunfawr	425,733	12,482	2.93%	10,449	10,603	12,377	12,482
	48	2116	Glancegin	721,506	43,312	6.00%	27,244	30,734	47,977	43,312
	49	2118	Bab Coed Mawr	256,387	37,181	14.50%	33,445	32,751	26,032	37,181
	50	2119	Yr Hendre	1,274,265	-9,843	-0.77%	-13,317	24,602	31,011	-9,843
	51	2122	Bontnewydd	610,489	46,497	7.62%	62,142	55,190	37,435	46,497
	52	2123	Y Garnedd	905,325	34,868	3.85%	44,869	42,020	16,594	34,868
	53	2125	Cymerau	1,086,305	55,798	5.14%	-4,417	3,445	28,711	55,798
	54	2126	Abercaseg	409,882	77,907	19.01%	39,706	76,849	76,920	77,907
	55	2127	Y Felinheli	508,521	26,881	5.29%	10,345	15,748	14,406	26,881
	56	2180	Bala	339,582	32,664	9.62%	31,904	48,238	14,371	32,664
	57	2181	Traeth	615,243	25,053	4.07%	22,804	19,329	3,064	25,053
*	58	2182	Clogau	180,059	-2,040	-1.13%	27,735	16,805	4,127	-2,040
*	59	2183	Brithdir	163,359	17,468	10.69%	16,731	15,434	14,815	17,468
*	60	2184	Bryncrug	197,314	14,863	7.53%	11,363	10,518	15,234	14,863
*	61	2185	Corris	222,233	44,053	19.82%	12,724	26,819	38,702	44,053
*	62	2187	Dinas Mawddwy	196,999	13,476	6.84%	14,941	4,183	14,199	13,476
	63	2189	Dyffryn Ardudwy	214,548	8,616	4.02%	13,837	13,097	6,222	8,616
	64	2190	Bro Cynfal	228,572	25,006	10.94%	420	144	5,306	25,006
*	65	2191	Ganllwyd	172,563	5,312	3.08%	827	2,529	4,845	5,312
*	66	2192	Edmwnd Prys	181,655	12,379	6.81%	3,824	729	6,235	12,379
*	67	2194	Llanbedr	195,256	3,248	1.66%	20,602	18,101	8,147	3,248

Balansau Ysgolion 31 Mawrth 2013 /
School Balances 31 March 2013patrwm balansau dros 4 mlynedd /
pattern of balances over 4 years

	Rhif Ysgol / School No	Enw Ysgol / School Name	Dyranïad Terfynol / Final Allocation 2013/14	Balansau / Balances 31/03/2013	Balansau fel % o'r Dyranïad / Balances as a % of Allocation	
*	68	2196	Llanegryn	157,270	6,756	4.30%
*	69	2197	Llanelltyd	173,936	7,011	4.03%
*	70	2198	Y Garreg	151,656	19,292	12.72%
*	71	2199	O.M.Edwards	228,336	8,164	3.58%
*	72	2201	Llwyngwriil	148,196	15,568	10.50%
*	73	2205	Manod	375,316	50,064	13.34%
*	74	2206	Parc, Bala	157,540	11,675	7.41%
*	75	2207	Pennal	173,577	14,331	8.26%
*	76	2208	Cefn Coch	603,829	41,887	6.94%
*	77	2210	Talsarnau	184,237	6,090	3.31%
*	78	2211	Tanygrisiau	233,062	752	0.32%
*	79	2212	Penybryn	722,295	103,414	14.32%
*	80	2213	Bro Hedd Wyn	260,303	20,104	7.72%
*	81	2214	Frongoch	155,513	13,288	8.54%
*	82	2215	Ieuan Gwynedd	161,577	9,275	5.74%
*	83	2216	Friog	158,711	8,509	5.36%
*	84	2217	Aberdyfi	166,815	9,187	5.51%
*	85	2219	Tan y Castell	271,961	26,525	9.75%
*	86	2220	Ffridd y Llyn	220,365	29,036	13.18%
*	87	2221	Maenofferen	797,417	31,759	3.98%
*	88	2227	Hirael	621,865	43,481	6.99%
*	89	3004	Pont y Gôf	318,226	16,406	5.16%
*	90	3005	Maesincla	1,119,099	72,464	6.48%
*	91	3009	Faenol	652,981	49,351	7.56%
*	92	3010	Foelgron	161,254	16,647	10.32%
*	93	3013	Llandygai	545,185	67,094	12.31%
*	94	3018	Llandwrog	264,644	20,194	7.63%
*	95	3023	Llanystumdwy	142,241	18,231	12.82%
*	96	3029	Tregarth	471,977	102,669	21.75%
*	97	3030	Cae Top	789,260	15,834	2.01%
*	98	3037	Llanfachraeth	140,480	41,712	29.69%
*	99	3041	Dolgellau	554,584	23,504	4.24%
*	100	3300	Santes Helen	321,713	18,930	5.88%
*	101	3301	Our Lady	383,141	34,511	9.01%
*	102	3305	Beuno Sant	218,082	17,277	7.92%
CYNRADD / PRIMARY			35,089,099	2,343,865	6.68%	

Balansau / Balances 31/03/2010	Balansau / Balances 31/03/2011	Balansau / Balances 31/03/2012	Balansau / Balances 31/03/2013
21,064	18,577	9,437	6,756
-3,440	767	5,186	7,011
10,506	15,189	18,074	19,292
14,873	9,541	12,920	8,164
20,996	30,965	31,211	15,568
19,138	7,895	18,696	50,064
3,661	7,106	11,627	11,675
4,805	9,786	14,959	14,331
39,591	27,531	22,445	41,887
4,174	2,406	-1,873	6,090
-21,114	-6,325	9,910	752
82,379	102,447	126,858	103,414
19,485	22,565	23,577	20,104
2,506	21,500	16,375	13,288
2,878	3,473	6,157	9,275
1,055	4,472	11,568	8,509
-342	4,721	11,601	9,187
63,587	60,020	35,560	26,525
9,092	10,525	25,969	29,036
6,687	32,054	19,217	31,759
27,117	29,095	50,304	43,481
16,259	34,540	24,406	16,406
40,276	66,974	79,535	72,464
42,395	62,306	64,443	49,351
26,464	27,274	19,872	16,647
28,081	35,835	54,162	67,094
13,025	4,817	4,988	20,194
2,455	12,226	21,803	18,231
60,265	86,301	106,351	102,669
919	5,018	20,769	15,834
17,409	19,064	30,445	41,712
10,264	20,566	21,745	23,504
-673	-4,927	-4,600	18,930
41,839	32,735	11,314	34,511
-7,062	-6,895	9,521	17,277
2,133,036	2,363,174	2,309,098	2,343,865

* ysgolion yn derbyn gwarchodaeth lleiafswm staffio yn 2012/13
schools' in receipt of minimum staffing levels in 2012/13

Balansau Ysgolion 31 Mawrth 2013 /
School Balances 31 March 2013

	Rhif Ysgol / School No	Enw Ysgol / School Name	Dyraniad Terfynol / Final Allocation 2013/14	Balansau / Balances 31/03/2013	Balansau fel % o'r Dyraniad / Balances as a % of Allocation
1	4002	Dyffryn Ogwen	1,842,903	107,424	5.83%
2	4003	Botwnnog	2,036,164	127,980	6.29%
3	4004	Brynrefail	3,286,400	98,221	2.99%
4	4007	Dyffryn Nantlle	2,405,137	94,707	3.94%
5	4009	Eifionydd	1,906,727	176,868	9.28%
6	4030	Y Gader	1,975,161	-15,644	-0.79%
7	4031	Y Moelwyn	1,755,846	172,715	9.84%
8	4032	Tywyn	1,552,763	96,856	6.24%
9	4033	Y Berwyn	1,793,776	-181,017	-10.09%
10	4034	Ardudwy	1,725,262	165,986	9.62%
11	4036	Friars	5,320,990	59,547	1.12%
12	4037	Tryfan	2,249,096	177,021	7.87%
13	4039	Syr Hugh Owen	3,957,418	142,344	3.60%
14	4040	Glan Y Môr	2,368,306	250,358	10.57%
UWCHRADD / SECONDARY			34,175,948	1,473,367	4.31%
1	3501	Coed Menai	ysgol wedi cau		
2	3502	Pendalar	1,352,200	-5,132	-0.38%
3	3503	Hafod Lon	650,327	1,217	0.19%
ARBENNIG / SPECIAL			2,002,526	-3,915	-0.20%
Cyfanswm / Total			71,267,573	3,813,317	5.35%

patrwm balansau dros 4 mlynedd /
pattern of balances over 4 years

Balansau / Balances 31/03/2010	Balansau / Balances 31/03/2011	Balansau / Balances 31/03/2012	Balansau / Balances 31/03/2013
141,758	194,899	138,737	107,424
131,101	141,957	175,823	127,980
109,873	151,459	119,105	98,221
30,300	29,909	76,733	94,707
246,002	288,435	288,171	176,868
-22,881	-4,844	-1,558	-15,644
185,814	282,851	373,132	172,715
78,137	163,959	115,799	96,856
-96,083	-243,889	-229,442	-181,017
267,313	240,798	212,791	165,986
-33,414	9,255	-5,140	59,547
221,456	235,101	226,223	177,021
65,118	225,975	312,709	142,344
302,705	311,709	256,333	250,358
1,627,199	2,027,571	2,059,415	1,473,367
44,125	58,698	69,183	0
-20,445	-21,438	-1,171	-5,132
21,132	3,514	1,094	1,217
44,812	40,773	69,107	-3,915
3,805,047	4,431,519	4,437,620	3,813,317

SCHOOLS BALANCES QUESTIONNAIRE 2012/13

To be completed by the Head Teacher / Governors and returned to Uned Gyllid Datblygu, Cyngor Gwynedd, Caernarfon, LL55 1SH

Ysgolion Gwynedd

TOTAL BALANCES 31 March 2013

£3,813,317

balances as a percentage of allocation

5.35%

In accordance with the Governing Body's decisions the balances are to be used as follows -		
	£	details
1		Balancing the Budget in 2013/14 in accordance with the school's final budget
Additional plans for 2013/14 which have not been included in the budget -		
2		
3		
4		
5		
6		Monies not earmarked for a specific purpose during 2013/14 31/03/2013 balances less 1-5 above (formula)
7		In year savings not included in the budget
8		Grants not included in the budget
9		Other Income not included in the budget
10		Total resources NOT earmarked at the end of 2013/14 estimated balances 31/03/2014 (formula)
Provision post 2013/14 -		
11		e.g. Decreasing Pupil Numbers
12		
13		
14		Total resources NOT earmarked lines 10 less 11-13 (formula)
<p>signed</p> <p>HEAD TEACHER <input style="width: 200px; height: 20px;" type="text"/> date <input style="width: 80px; height: 20px;" type="text"/></p> <p>CHAIR OF GOVERNORS <input style="width: 200px; height: 20px;" type="text"/> date <input style="width: 80px; height: 20px;" type="text"/></p>		

questionnaire to be returned to - Uned Gyllid Datblygu, Cyngor Gwynedd, Caernarfon, LL55 1SH by **5 July 2013**

Balansau Ysgolion 2012/13 School Balances

mae ffigwr minws yn adnabod ysgol sydd wedi ychwanegu at balansau 31/03/2012
a minus figure indicates that the school has increased its balance during the year

			AMCAN 1		AMCAN 2	GWIR		
	Rhif Ysgol School No	Enw Ysgol School Name	Balansau Balances 31/03/2012	defnydd balansau i osod cyllideb use of balances to set the buget for 2012/13	balansau wedi gosod cyllideb balances after setting the budget 2012/2013	adolygiad yn ystod y flwyddyn in-year revision 2012/13	gwir falansau actual balances 31/03/2013	
	1	2000	Gwaun Gynfi	46,115	24,078	22,037	35,000	40,986
	2	2004	Nefyn	54,500	26,133	28,367	45,000	40,787
	3	2006	Llanrug	-7,949	-1,441	-6,508	0	-7,324
	4	2008	Abererch	6,448	-1,883	8,331	15,000	13,384
*	5	2009	Abersoch	5,720	0	5,720	15,000	20,741
*	6	2010	Beddgelert	22,741	9,498	13,243	15,000	17,317
	7	2011	Bethel	11,978	11,978	-0	-15,000	-14,380
	8	2013	Bodfeurig	42,207	20,795	21,412	40,000	31,914
	9	2015	Borthygest	5,441	-3,781	9,222	10,000	5,378
*	10	2016	Bronyfoel	29,399	9,719	19,680	30,000	32,050
	11	2017	Brynaerau	11,902	0	11,902	20,000	10,825
	12	2024	Carmel	23,779	11,415	12,364	20,000	19,832
	13	2026	Y Gelli	59,679	57,280	2,399	25,000	39,515
	14	2028	Penybryn	23,148	7,246	15,902	30,000	31,023
	15	2033	Treferythyr	65,997	35,671	30,326	40,000	45,096
	16	2035	Cwm Y Glo	5,356	-3,707	9,063	25,000	25,914
	17	2036	Chwilog	507	0	507	10,000	-1,188
	18	2039	Crud Y Werin	9,369	1,541	7,828	15,000	11,277
	19	2042	Dolbadarn	41,940	23,969	17,971	40,000	35,205
	20	2046	Edern	13,597	10,894	2,703	10,000	5,053
*	21	2047	Felinwnda	15,347	10,213	5,134	12,000	10,451
	22	2048	Bro Plennydd	9,055	0	9,055	10,000	5,393
	23	2049	Garndolbenmaen	16,988	3,226	13,762	20,000	9,952
	24	2051	Glanadda	28,147	19,092	9,055	20,000	24,147
	25	2057	Groeslon	41,254	15,264	25,990	30,000	37,036
*	26	2059	Llanaelhaearn	1,125	1,124	1	5,000	-2,306
	27	2060	Llanbedrog	16,295	7,642	8,653	10,000	6,955
	28	2066	Llangybi	11,330	4,480	6,850	20,000	13,977
	29	2069	Llanllechid	86,109	66,081	20,028	50,000	47,858
	30	2070	Llanllyfni	27,638	-4,135	31,773	40,000	47,628
*	31	2071	Llidiardau	5,319	1,113	4,206	10,000	1,872
	32	2075	Bab Morfa Nefyn	33,557	15,382	18,175	20,000	21,036
*	33	2078	Baladeulyn	1,746	500	1,246	3,000	713
*	34	2081	Nebo	9,990	2,212	7,778	15,000	21,829
	35	2085	Penisarwaen	22,490	12,599	9,891	20,000	20,369
	36	2089	Bro Lleu	39,248	1,822	37,426	55,000	42,569
	37	2093	Pentreuchaf	23,419	5,031	18,388	25,000	16,529
*	38	2097	Rhiwlas	-9,576	2,521	-12,097	-7,000	-3,813
*	39	2098	Rhosgadfan	1,524	0	1,524	5,000	-564
	40	2099	Rhostryfan	-6,564	0	-6,564	-6,000	-5,758
	41	2103	Sarn Bach	16,573	0	16,573	25,000	36,917
	42	2104	Eifion Wyn	26,173	-20,050	46,223	45,000	34,524
	43	2108	Talysarn	25,634	18,038	7,596	20,000	27,321
	44	2110	Y Gorlan	6,645	6,645	-0	10,000	7,335
	45	2111	Yr Eifl	4,266	2,442	1,824	5,000	1,365
*	46	2112	Tudweiliog	12,236	5,309	6,927	5,000	953
	47	2113	Waunfawr	12,377	1,944	10,433	15,000	12,482
	48	2116	Glancegin	47,977	22,829	25,148	25,000	43,312
	49	2118	Bab Coed Mawr	26,032	6,693	19,339	30,000	37,181
	50	2119	Yr Hendre	31,011	7,317	23,694	15,000	-9,843
	51	2122	Bontnewydd	37,435	14,346	23,089	45,000	46,497
	52	2123	Y Garnedd	16,594	1,506	15,088	25,000	34,868
	53	2125	Cymerau	28,711	11,846	16,865	30,000	55,798

Balansau Ysgolion 2012/13 School Balances

mae ffigwr minws yn adnabod ysgol sydd wedi ychwanegu at balansau 31/03/2012
a minus figure indicates that the school has increased its balance during the year

			AMCAN 1		AMCAN 2	GWIR		
	Rhif Ysgol School No	Enw Ysgol School Name	Balansau Balances 31/03/2012	defnydd balansau i osod cyllideb use of balances to set the buget for 2012/13	balansau wedi gosod cyllideb balances after setting the budget 2012/2013	adolygiad yn ystod y flwyddyn in-year revision 2012/13	gwir falansau actual balances 31/03/2013	
	54	2126	Abercaseg	76,920	20,416	56,504	75,000	77,907
	55	2127	Y Felinheli	14,406	3,904	10,502	25,000	26,881
	56	2180	Bala	14,371	10,289	4,082	20,000	32,664
	57	2181	Traeth	3,064	0	3,064	15,000	25,053
*	58	2182	Clogau	4,127	4,127	-0	5,000	-2,040
*	59	2183	Brithdir	14,815	0	14,815	10,000	17,468
*	60	2184	Bryncrug	15,234	7,000	8,234	20,000	14,863
	61	2185	Corris	38,702	20,662	18,040	45,000	44,053
*	62	2187	Dinas Mawddwy	14,199	3,718	10,481	15,000	13,476
	63	2189	Dyffryn Ardudwy	6,222	859	5,363	15,000	8,616
	64	2190	Bro Cynfal	5,306	0	5,306	15,000	25,006
*	65	2191	Ganllwyd	4,845	785	4,060	5,000	5,312
*	66	2192	Edmwnd Prys	6,235	0	6,235	15,000	12,379
	67	2194	Llanbedr	8,147	5,341	2,806	5,000	3,248
*	68	2196	Llanegryn	9,437	2,673	6,764	15,000	6,756
*	69	2197	Llanelltyd	5,186	0	5,186	10,000	7,011
*	70	2198	Y Garreg	18,074	9,029	9,045	15,000	19,292
	71	2199	O.M.Edwards	12,920	0	12,920	15,000	8,164
*	72	2201	Llwyngwril	31,211	15,012	16,199	15,000	15,568
	73	2205	Manod	18,696	-8,351	27,047	45,000	50,064
*	74	2206	Parc, Bala	11,627	5,723	5,904	15,000	11,675
*	75	2207	Pennal	14,959	4,042	10,917	15,000	14,331
	76	2208	Cefn Coch	22,445	0	22,445	25,000	41,887
*	77	2210	Talsarnau	-1,873	-1,873	-0	5,000	6,090
	78	2211	Tanygrisiau	9,910	5,836	4,074	5,000	752
	79	2212	Penybryn	126,858	67,778	59,080	85,000	103,414
	80	2213	Bro Hedd Wyn	23,577	13,366	10,211	25,000	20,104
*	81	2214	Frongoch	16,375	11,743	4,632	20,000	13,288
*	82	2215	Ieuan Gwynedd	6,157	0	6,157	5,000	9,275
*	83	2216	Friog	11,568	4,276	7,292	10,000	8,509
*	84	2217	Aberdyfi	11,601	5,184	6,417	5,000	9,187
	85	2219	Tan y Castell	35,560	25,054	10,506	25,000	26,525
	86	2220	Ffridd y Llyn	25,969	12,339	13,630	30,000	29,036
	87	2221	Maenofferen	19,217	-6,732	25,949	15,000	31,759
	88	2227	Hirael	50,304	29,112	21,192	40,000	43,481
	89	3004	Pont y Gôf	24,406	11,644	12,762	25,000	16,406
	90	3005	Maesincla	79,535	49,800	29,735	50,000	72,464
	91	3009	Faenol	64,443	33,095	31,348	40,000	49,351
*	92	3010	Foelgron	19,872	6,686	13,186	15,000	16,647
	93	3013	Llandygai	54,162	31,674	22,488	55,000	67,094
	94	3018	Llandwrog	4,988	4,511	477	15,000	20,194
*	95	3023	Llanystumdwy	21,803	8,289	13,514	20,000	18,231
	96	3029	Tregarth	106,351	59,348	47,003	100,000	102,669
	97	3030	Cae Top	20,769	16,365	4,404	15,000	15,834
*	98	3037	Llanfachraeth	30,445	-12,273	42,718	45,000	41,712
	99	3041	Dolgellau	21,745	21,745	0	15,000	23,504
	100	3300	Santes Helen	-4,600	-13,099	8,499	15,000	18,930
	101	3301	Our Lady	11,314	-1,683	12,997	20,000	34,511
	102	3305	Beuno Sant	9,521	0	9,521	20,000	17,277
	CYNRADD / PRIMARY		2,309,098	969,851	1,339,247	2,252,000	2,343,865	

cynnydd yn balansau 34,767

Balansau Ysgolion 2012/13 School Balances

mae ffigur minws yn adnabod ysgol sydd wedi ychwanegu at balansau 31/03/2012
 a minus figure indicates that the school has increased its balance during the year

		AMCAN 1			AMCAN 2	GWIR
Rhif Ysgol School No	Enw Ysgol School Name	Balansau Balances 31/03/2012	defnydd balansau i osod cyllideb use of balances to set the buget for 2012/13	balansau wedi gosod cyllideb balances after setting the budget 2012/2013	adolygiad yn ystod y flwyddyn in-year revision 2012/13	gwir falansau actual balances 31/03/2013
<hr/>						

* ysgolion yn derbyn gwarchodaeth lleiafswm staffio yn 2012/13

Balansau Ysgolion 2012/13 School Balances

mae ffigwr minws yn adnabod ysgol sydd wedi ychwanegu at balansau 31/03/2012
a minus figure indicates that the school has increased its balance during the year

		AMCAN 1			AMCAN 2	GWIR	
Rhif Ysgol School No	Enw Ysgol School Name	Balansau Balances 31/03/2012	defnydd balansau i osod cyllideb use of balances to set the buget for 2012/13	balansau wedi gosod cyllideb balances after setting the budget 2012/2013	adolygiad yn ystod y flwyddyn in-year revision 2012/13	gwir falansau actual balances 31/03/2013	
1	4002	Dyffryn Ogwen	138,737	85,016	53,721	41,200	107,424
2	4003	Botwnnog	175,823	174,278	1,545	110,700	127,980
3	4004	Brynrefail	119,105	67,936	51,169	95,900	98,221
4	4007	Dyffryn Nantlle	76,733	284	76,449	109,200	94,707
5	4009	Eifionydd	288,171	237,796	50,375	180,000	176,868
6	4030	Y Gader	-1,558	0	-1,558	-36,500	-15,644
7	4031	Y Moelwyn	373,132	48,594	324,538	243,190	172,715
8	4032	Tywyn	115,799	67,541	48,258	80,000	96,856
9	4033	Y Berwyn	-229,442	-24,857	-204,585	-185,000	-181,017
10	4034	Ardudwy	212,791	17,531	195,260	207,000	165,986
11	4036	Friars	-5,140	-80,000	74,860	20,000	59,547
12	4037	Tryfan	226,223	135,638	90,585	80,800	177,021
13	4039	Syr Hugh Owen	312,709	138,034	174,675	171,000	142,344
14	4040	Glan Y Môr	256,333	116,273	140,060	140,000	250,358
UWCHRADD / SECONDARY		2,059,415	984,064	1,075,351	1,257,490	1,473,367	
Ileihad yn balansau		-586,048					
1	3501	Coed Menai	69,183	ysgol wedi cau 31/08/2012			
2	3502	Pendalar	-1,171	0	-1,171	-50,000	-5,132
3	3503	Hafod Lon	1,094	0	1,094	5,000	1,217
ARBENNIG / SPECIAL		69,107	0	-77	-45,000	-3,915	
Ileihad yn balansau		-73,022	(balansau Coed Menai £111,745 wedi'i drosglwyddo i Gronfa All-Sirol)				
Cyfanswm / Total		4,437,620	1,953,915	2,414,521	3,464,490	3,813,317	
Ileihad yn balansau		-624,303					

MEETING	SCHOOLS FINANCE FORUM
DATE	25 June 2013
TITLE	School Grants 2013/14
PURPOSE	To explain the arrangements and the delegated funding of grant resources and the required accountability
RECOMMENDATION	To approve the allocations and the working plans
AUTHOR	Dewi R Jones, Head of Education
CABINET MEMBER FOR EDUCATION	Councillor Sian Gwenllian

All schools will receive full details of their SEG, PDG and WG allocation, and detailed directions for financial planning/monitoring proforma between the 1-5 of July. See Appendix 1 for allocation details.

School Effectiveness Grant (SEG)

All Local Authorities are expected to delegate at least 75% of the SEG this year, with the expectation of increasing this further next year. A summary of the WG guidance on the SEG has been presented in GYDCA, GCSU and full headteachers' meetings, and draft details of the allocation to schools was shared at these meetings.

Clear instructions have been received by WG about the expectations on schools to target funding to tackle Literacy, Numeracy and Reducing the Effects of Deprivation. Schools are expected to claim the grant according to WG guidance and the demands of the statutory framework for Literacy and Numeracy from September 2013, and the guidance offered by the Sutton Trust.

Expectations have also been heightened regarding schools' accountability this year. As Cynnal no longer administers the INSET programme for schools, nor allocates 'credits' for primary and special schools for CPD, the grant has been allocated to all sectors according to a new formula based on the following: number of pupils(60%), number of staff (20%) percentage of pupils e-FSM (20%).

National guidance for SEG, PDG and WG demands that all schools must present a Spending and Strategy Plan devised according to the North Wales Consortium agreement. The plan should include details of planned spending according to national priorities (Literacy, numeracy and reducing the Effects of Deprivation).

Outcomes for pupils and **costs** must be clearly noted. All schools will be required to present evidence of their spending in order to claim the grant from the LA. Schools and LAs are required to present financial reports three times a year To the Consortium based on these plans. In addition to this schools are required to present evidence of the 'effect' of any plans on pupil outcomes and attainment e.g. tracking improvements in reading/numeracy.

Pupil Deprivation Grant (PDG)

The Pupil Deprivation Grant is allocated 100% to schools based upon £450 per capita for every FSM pupil registered during the PLASC census in January 2012. Some schools will have no PDG allocation whilst other schools may have substantial sums allocated to them. In all cases the grant must be used for the direct benefit of the pupils identified as FSM, and according to the demands of the guidance issued by WG for the SEG. Improving parental engagement with education is an additional area of priority identified for the PDG.

A number of Gwynedd schools that are located within Communities First areas have collaborated to present a joint bid for matched funding from WG to finance specific activities which encourage parental participation in their children's education, for example facilitating successful transitions between sectors, empowering parents to support their children's education. Confirmation of the success of this bid is expected during the summer.

The requirement for detailed financial planning and tracking pupil outcomes are similar to the demands of the SEG. Schools will be expected to present spending plans and progress reports on the same format (and the same form) as the SEG Financial and Outcomes Plan.

Pupil Deprivation Grant – Looked After Children (LAC)

An additional allocation of £450 per pupil will be offered to schools according to the LAC (Looked after Child) data. Schools are expected to justify their spending according to the demands of the guidance presented for SEG and PDG funding.

Welsh in Education Grant

The Welsh in Education grant will be delegated according to the priorities of the strategic plan for Welsh. Spending will be targeted mainly through the successful Language Unit provision for latecomers, the 'immersion' schemes for pupils at secondary transition age and the catchment area language co-ordinator posts.

Grant for Band 4/5 schools

£10,000 is allocated to the five schools in Gwynedd that are within the 4/5 band range, for the purpose of raising standards. Four secondary schools are within the band 4 range with one school within the band 5 range.

GRANTIAU GEY / GAD / GAD (LAC) / BAND 4 & 5 2013-14

Grant Effeithiolrwydd Ysgolion (GEY) / School Effectiveness Grant (SEG)
 Grant Amddifadedd Ysgolion (GAD) / Pupil Deprivation Grant
 Grant Amddifadedd Ysgolion - Plant Mewn Gofal / Pupil Deprivation Grant - Looked After Children
 Grant Band 4 & 5 Ysgolion Uwchradd / Secondary Schools
 Grant y Gymraeg Mewn Addysg / Welsh in Education Grant
 Dyraniadau Ysgolion 2013-14 Arian Datganoledig / Schools Devolved Funding Allocations 2013-14

Ysgolion Cynradd / Primary Schools

RHIF YSGOL / SCHOOL NUMBER	YSGOL / SCHOOL	GEY / SEG	GAD / PDG	GAD - Plant Mewn Gofal / PDG - LAC	BAND 4 & 5	GYGMA / WEG	CYFANSWM / TOTAL
2000	GWAUN GYNFI	£5,122	£11,250			£1,039	£17,411
2004	NEFYN	£4,134	£7,200			£862	£12,196
2006	LLANRUG	£6,651	£4,500			£1,725	£12,876
2008	ABERERCH	£1,664	£3,600			£377	£5,640
2009	ABERSOCH	£724	£0			£127	£851
2010	BEDDGELERT	£1,112	£1,350			£191	£2,653
2011	BETHEL	£4,051	£2,700			£1,019	£7,771
2013	BODFEURIG	£1,802	£450			£430	£2,683
2015	BORTHYGEST	£1,662	£450			£403	£2,514
2016	BRONYFOEL	£1,286	£1,350			£185	£2,820
2017	BRYNAERAU	£2,464	£3,600			£526	£6,590
2024	CARMEL	£1,659	£3,150			£319	£5,128
2026	Y GELLI	£6,099	£5,400			£1,395	£12,894
2028	PENYBRYN	£3,862	£9,000			£780	£13,642
2033	TREFERTHYR	£3,060	£2,250			£798	£6,108
2035	CWM Y GLO	£1,908	£1,800			£418	£4,126
2036	CHWILOG	£1,836	£1,350			£440	£3,626
2039	CRUD Y WERIN	£1,610	£0			£402	£2,012
2042	DOLBADARN	£4,259	£5,850			£1,052	£11,162
2046	EDERN	£2,178	£2,700			£512	£5,390
2047	FELINWDA	£1,064	£450			£209	£1,724
2048	BRO PLENNYDD	£2,116	£450			£494	£3,060
2049	GARNDOLBENMAEN	£1,875	£3,150			£354	£5,379
2051	GLANADDA	£1,948	£6,300			£930	£9,178
2057	GROESLON	£2,489	£2,700			£520	£5,709
2059	LLANAELHAEARN	£1,513	£2,250			£287	£4,050
2060	LLANBEDROG	£2,186	£2,700			£514	£5,400
2066	LLANGYBI	£2,549	£2,700			£522	£5,771
2069	LLANLLECHID	£7,464	£12,600			£1,656	£21,720
2070	LLANLLYFNI	£3,349	£4,950			£646	£8,945
2071	LLIDIARDAU	£927	£3,150			£96	£4,173
2075	BABANOD MORFA NEFYN	£1,548	£450			£356	£2,354
2078	BALADEULYN	£992	£900			£165	£2,057
2081	NEBO	£1,268	£900			£250	£2,418
2085	PENISARWAEN	£1,502	£450			£342	£2,294
2089	BRO LLEU	£5,310	£9,900			£1,206	£16,416
2093	PENTREUCHAF	£2,649	£2,250			£651	£5,549
2097	RHIWLAS	£1,509	£1,800			£286	£3,595
2098	RHOSGADFAN	£1,733	£2,250			£313	£4,296
2099	RHOSTRYFAN	£2,258	£1,350			£508	£4,116
2103	SARN BACH	£1,626	£1,800			£351	£3,777
2104	EIFION WYN	£6,881	£13,050			£1,485	£21,415
2108	TALYSARN	£3,113	£10,350			£520	£13,983
2110	Y GORLAN	£3,038	£2,250			£778	£6,066
2111	YR EIFL	£1,474	£1,350			£290	£3,114
2112	TUDWEILIOG	£1,568	£900			£347	£2,815
2113	WAUNFAWR	£4,079	£10,350			£887	£15,316
2116	GLANCEGIN	£8,341	£27,900			£2,035	£38,276
2118	BABANOD COED MAWR	£2,245	£3,600			£1,033	£6,878
2119	YR HENDRE	£12,458	£22,500			£2,588	£37,546
2122	BONTNEWYDD	£4,693	£4,500			£1,249	£10,441
2123	Y GARNEDD	£9,696	£6,750			£3,030	£19,476
2125	CYMERAU	£10,685	£18,900			£2,418	£32,003
2126	ABERCASEG	£3,487	£4,950			£744	£9,181

RHIF YSGOL / SCHOOL NUMBER	YSGOL / SCHOOL	GEY / SEG	GAD / PDG	GAD - Plant Mewn Gofal / PDG - LAC	BAND 4 & 5	GYGMA / WEG	CYFANSWM / TOTAL
2127	Y FELINHELI	£4,176	£4,950			£1,042	£10,167
2180	BALA	£3,551	£1,350			£772	£5,673
2181	TRAETH	£6,276	£12,600			£1,420	£20,297
2182	CLOGAU	£1,263	£2,250			£229	£3,742
2183	BRITHDIR	£1,283	£450			£306	£2,039
2184	BRYNGRUG	£677	£0			£104	£781
2185	CORRIS	£1,681	£3,150			£339	£5,170
2187	DINAS MAWDDWY	£991	£1,350			£147	£2,488
2189	DYFFRYN ARDUDWY	£1,719	£2,250			£349	£4,318
2190	BRO CYNFAL	£1,537	£3,600			£353	£5,490
2191	GANLLWYD	£915	£0			£136	£1,051
2192	EDMWND PRYS	£1,276	£450			£270	£1,996
2194	LLANBEDR	£1,890	£2,250			£371	£4,512
2196	LLANEGRYN	£566	£2,250			£74	£2,890
2197	LLANELLYD	£1,279	£0			£305	£1,584
2198	Y GARREG	£927	£450			£140	£1,517
2199	O.M. EDWARDS	£2,139	£900			£504	£3,543
2201	LLWYNGWRIL	£490	£450			£61	£1,001
2205	MANOD	£3,842	£7,650			£650	£12,142
2206	PARC, BALA	£493	£0			£68	£561
2207	PENNAL	£1,016	£1,350			£191	£2,558
2208	CEFN COCH	£4,950	£7,200			£1,254	£13,404
2210	TALSARNAU	£1,170	£450			£249	£1,869
2211	TANYGRISIAU	£2,427	£6,300			£447	£9,174
2212	PENBRYN	£7,234	£10,350			£1,603	£19,187
2213	BRO HEDD WYN	£2,440	£1,800			£561	£4,801
2214	FRONGOCH	£1,156	£0			£260	£1,416
2215	IEUAN GWYNEDD	£803	£0			£130	£933
2216	FRIOG	£1,363	£2,250			£214	£3,826
2217	ABERDYFI	£472	£0			£62	£534
2219	TAN Y CASTELL	£2,868	£4,050			£575	£7,493
2220	FFRIDD Y LLYN	£2,148	£1,800			£460	£4,409
2221	MAENOFFEREN	£6,798	£15,750			£1,405	£23,953
2227	HIRAEI	£6,940	£16,650			£1,973	£25,564
2228	CRAIG Y DERYN	£1,349	£0			£335	£1,684
3004	PONT Y GOF	£2,849	£1,350			£723	£4,921
3005	MAESINCLA	£12,455	£39,150			£2,113	£53,718
3009	FAENOL	£6,246	£4,950			£2,285	£13,481
3010	FOELGRON	£1,506	£1,350			£214	£3,069
3013	LLANDYGAI	£4,524	£9,000			£1,073	£14,597
3018	LLANDWROG	£1,937	£1,350			£456	£3,743
3023	LLANYSTUMDWY	£1,341	£450			£276	£2,067
3029	TREGARTH	£4,505	£9,000			£997	£14,502
3030	CAE TOP	£7,034	£10,350			£2,295	£19,679
3037	LLANFACHRETH	£766	£900			£106	£1,772
3041	DOLGELLAU	£4,645	£9,900			£1,039	£15,585
3300	SANTES HELEN	£2,546	£3,150			£591	£6,288
3301	EIN HARGLWYDDES	£3,216	£3,600			£1,357	£8,173
3305	BEUNO SANT	£1,926	£4,500			£423	£6,849
	Ysgolion Cynradd / Primary Schools	£312,380	£472,050	£0	£0	£72,367	£856,796

Ysgolion Arbennig / Special Schools

3502	PENDALAR	£3,648	£6,300			£602	£10,550
3503	HAFOD LON	£2,149	£4,050			£342	£6,541
	Ysgolion Arbennig / Special Schools	£5,797	£10,350	£0	£0	£943	£17,091

Targeddu	£220,000	£0				£0	£220,000
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GAD - Plant Mewn Gofal - Heb ei ddyrannu / PDG - Looked After Children - Not allocated				£57,150			£57,150
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RHIF YSGOL / SCHOOL NUMBER	YSGOL / SCHOOL	GEY / SEG	GAD / PDG	GAD - Plant Mewn Gofal / PDG - LAC	BAND 4 & 5	GYGMA / WEG	CYFANSWM / TOTAL
CYFANSWM YSGOLION CYNRADD AC ARBENNIG / PRIMARY AND SPECIAL SCHOOLS TOTAL		£538,177	£482,400	£57,150	£0	£73,310	£1,151,037

RHIF YSGOL / SCHOOL NUMBER	YSGOL / SCHOOL	GEY / SEG	GAD / PDG	GAD - Plant Mewn Gofal / PDG - LAC	BAND 4 & 5	GYGMA / WEG	CYFANSWM / TOTAL
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Ysgolion Uwchradd / Secondary Schools

4002	DYFFFRYN OGWEN	£17,574	£23,850			£3,594	£45,018
4003	BOTWNNOG	£19,247	£15,750			£3,835	£38,832
4004	BRYNREFAIL	£31,288	£28,800			£4,815	£64,903
4007	DYFFFRYN NANTLLE	£21,977	£26,550		£10,000	£4,020	£62,546
4009	EIFIONYDD	£18,216	£18,900			£3,790	£40,906
4030	Y GADER	£17,488	£20,700			£3,650	£41,839
4031	Y MOELWYN	£17,109	£22,500			£3,545	£43,154
4032	TYWYN	£13,228	£13,050		£10,000	£3,383	£39,661
4033	Y BERWYN	£13,970	£7,650			£3,525	£25,145
4034	ARDUDWY	£14,228	£14,400		£10,000	£3,437	£42,065
4036	FRIARS	£54,749	£71,100		£10,000	£6,197	£142,046
4037	TRYFAN	£24,274	£27,900		£10,000	£11,110	£73,284
4039	SYR HUGH OWEN	£38,568	£50,850		£10,000	£5,002	£104,420
4040	GLAN Y MOR	£23,747	£26,550			£4,096	£54,393
		£325,663	£368,550	£0	£60,000	£64,000	£818,213

Targed	£105,000	£0		£0	£0	£105,000
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CYFANSWM YSGOLION UWCHRADD / SECONDARY SCHOOLS TOTAL	£430,663	£368,550	£0	£60,000	£64,000	£923,213
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Llwybrau Ni		£9,000				
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CYFANSWM / TOTAL	£968,840	£859,950	£57,150	£60,000	£137,310	£2,074,250
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MEETING	SCHOOLS FINANCE FORUM
DATE	25 JUNE 2013
TITLE	Schools' Service Level Agreements
PURPOSE	Explain the content of the agreements
RECOMMENDATION	Accept the agreements
AUTHOR	Dewi R Jones, Head of Education
CABINET MEMBER FOR EDUCATION	Councillor Sian Gwenllian

Service Level Agreements (SLA) are presented for –

Repairs and Maintenance Secondary Schools

Changes to the SLA (secondary)

1. Last year's Maintenance SLA has been extended for a year. The new SLA has now been completed and a representation of secondary headteachers have commented on it.
2. Responsibilities for funding various school buildings maintenance elements are contained in the Fair Funding Agreement. Basic changes to the SLA cannot therefore be made.
3. Over the years, several Headteachers have said that the current SLA is a laborious and difficult to interpret document. It was a 43 page document that contained a 22 page table detailing responsibilities for detailed elements of the building!
4. The document by its very nature, often caused a misunderstanding and differences of opinion between Headteachers and those who organized maintenance work.
5. The new SLA is therefore a much simpler document and tries to summarize everything in about 10 pages. A 5 page table has replaced the lengthy list contained in the former document. The table now notes what the Council is responsible for. Unless an element of a building is included in this table, then the School will automatically be responsible for it.
6. As regards the specific responsibilities, the only change is that the Council now accepts responsibility for funding disposal of asbestos from lorries when the School wishes to install new flooring. In the former

agreement, the school was responsible for all this work - leading to a failure to complete the work as it could not be done without first of all disposing of the asbestos, and the Schools found this unaffordable. We therefore hope that this change will be welcomed.

7. The only other change is the establishment of an e-mail address and a phone number for any enquiry related to building matters. From now on, everything can be referred to eiddo@gwynedd.gov.uk or tel 01286 679059.
8. The system of responding to calls for maintenance work has recently been fully reviewed, and by the time that the new SLA is up and running, a new system will be implemented throughout the County. From now on, the Service will come under the Council Customer Care Department instead of the Consultancy Department as was the case over the past 5 years. We trust that Headteachers will see a service that clearly focuses on their "client" requirements.

The Learning Needs Team

The SLA for the Learning Needs Team outlines the service offered to schools by the specialist teachers' team. This includes assessing needs, tracking progress, devising and delivering learning intervention programmes in literacy, numeracy, speech and communication difficulties, dyslexia, and basic skills. The team also offer training programmes in various areas for school staff, parents and governors. Annual reports are presented to the LA on an annual basis about the progress of pupils open to the service.

This year's SLA has been adapted to reflect clearly an understanding of the monitoring responsibilities associated with the delegation of this funding, either through the SLA or the school's use of the funding to meet pupils SEN needs.

Integration (88 schools)

The Integration SLA outlines the SEN/ALN services supplied to schools by the LA, including the resources needed to respond appropriately to pupil needs regardless of the time of year that they may be registered as pupils at that school. The present SLA will be offered to schools for the next year, until the Strategic Review of SEN/ALN is completed.

Governors' Clerk

There is a new requirement for LEA's to establish a Clerk to the Governors Service that would be available to those schools who wish to receive it. The service is required to be available from September 2013.

The SLA costs £800 and takes into account the cost of employing the clerk and additional costs involved in advertising, training, administering clerk placements and organizing supply cover clerks when running the central service.

Several schools have already declared an interest in the SLA.

MEETING	SCHOOLS BUDGET FORUM
DATE	25 June 2013
HEADING	Devolving Additional Services for Schools
PURPOSE	Consider which services should be considered to be devolved by 2014/15
RECOMMENDATION	
REPORT BY	Dewi R Jones, Head of Education
CABINET MEMBER FOR EDUCATION	Cllr Sian Gwenllian

(A) Background

In his statements, the Minister for Education has clearly expressed a desire to see more funding being transferred to schools.

The Welsh Local Government Association and the Wales Directors of Education Association (WLGA/ADEW) have given a pledge that the delegated percentage will be increased to 80% by 2012/2013 and then to 85% by 2014/2015.

In 2011/12, the Welsh Government (WG) calculated that Gwynedd Council had devolved 75.2% of the school's element of the Education (gross of specific grants) budget (Welsh average 76.2%).

Through devolving Integration, Cognition and Learning and Catering services funding to Primary Schools, the devolved funding was increased to 80.4% in 2012/13.

Following a review of Education specific grants for 2013/14, it was found that an element of the grants did not relate to school age pupils education or occurred within a school. The outcome of the review was the adjustment of the basis for completion of the Welsh Government budget forms that led to increasing the delegated percentage to 82.25% for 2013/14.

(B) 85% in 2014/15

There is a need to reach a devolved percentage of 85% by 2014/15 if the pledge is to be honoured.

With the percentage in Gwynedd standing at 82.25% in 2013/14, **there will be a need to devolve additional funding equivalent to £2.8 million in 2014/15** (roughly in Gwynedd, increasing devolving by 1% equates to devolving £1million).

Enclosed is a spreadsheet (Appendix 1) that indicates schools 'central' education services in 2013/14.

The Schools Funding Forum is asked to deliberate over this matter and state which service(s) that the Education Department should consider devolving by 2014/15.

It is intended to consult with all schools in Gwynedd on this issue at the beginning of the 2013 Autumn term.

Cyllideb Addysg 'Canolog' Ysgolion 2013/14

Schools 'Central' Education Budget 2013/14

Pennawd	Gros / Gross £	CLG Canolog presenol Current central SLA			Toriadau / Cuts 2014/15 a / and 2015/16	Heading
		Grant £	£	£	£	
Cludiant Ysgolion	3,794,960					Schools' Transport
Grantiau amrywiol	1,515,950	-1,509,680				Various Grants
Ymddeol Cynnar	1,186,240					Early Retirement
Disgyblion All Sirol	1,055,770					Out of County Pupils
Anghenion Arbennig - Amrywiol	985,660			-300,000		Special Needs - Various
Cyfalaf - Cynnal a Chadw	946,870					Capital - Repairs and Maintenance
Cyd-Bwyllgor Anghenion Dysgu Ychwanegol	740,700					Special Education Needs Joint-Committee
Addysg Meithrin	666,720			-100,000		Nursery Education
Yswiriant	395,770					Insurance
GwE	395,280					GwE
Grant Cymraeg Mewn Addysg	383,550	-209,570				Welsh in Education Grant
Unedau Cyfeirio Disgyblion	368,450					Pupil Referral Units
Grant Effeithiolrwydd Ysgolion	319,090	-55,220				Schools' Effectiveness Grant
Arall	290,710	-31,080				Other
Uned Trefniadaeth Ysgolion	276,730					Schools' Reorganisation Unit
Gwasanaeth Lles	241,540					Welfare Service
Cynnal	194,660					Cynnal
Gwasanaeth CWNSELA yn ysgolion	176,000					Counselling Service in schools
Addysg Tu Allan i Ysgol	142,860					Education Other than in Schools
Blas am Oes	106,260					Blas am Oes
Cyd-Bwyllgor Addysg Cymru (CBAC)	82,280					Welsh Joint Education Committee (WJEC)
Gwasanaeth Llyfrgell i Ysgolion	70,980					Library Service for Schools
Cerdd	66,430					Music
Trwyddedau, Tanysgrifiadau	54,100					Licenses, Subscriptions
Adran Addysg - Rheolaeth/Gweinyddiaeth	840,026		-406,610			Education Department - Management/Administration
Strategol a Gwella	344,440					Strategic and Improvement
Cyllid	721,283		-183,800			Finance
Technoleg Gwybodaeth	223,530					Information Technology
Gweinyddol	28,410					Administration
Adnoddau Dynol	72,100					Human Resources
Cyfreithiol	37,790					Legal
Gwasanaeth Eiddo	506,590		-181,430			Property Services
Gofal Cwsmer	247,440					Customer Care
Tim Arweinyddiaeth	102,430					Leadership Group
	17,581,599	-1,805,550	-771,840	-400,000		