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# SCHOOLS' BUDGET FORUM

## 02.12.2024

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**Present:**

**Cabinet Members:** Councillor Paul Rowlinson (Finance)

**School Headteachers:**

Secondary: Aled Williams (Ysgol Ardudwy)

Primary: Richard Derwyn Jones (Ysgol Chwilog) (Chair)  
Gwion Owens (Cefn Coch and Talsarnau Federation)  
Nia Puw (Ysgol Llanrug)  
Alan Wynn Jones (Ysgol Cymerau)  
Eleri Morgan Davies (Ysgol y Gorlan)  
Kyle Jones (Ysgol yr Hendre)

**Governors:** Councillor Ioan Thomas (Ysgol y Gelli and Ysgol Syr Hugh Owen)  
Carys Meleri Fowles (Ysgol Penybryn and Ysgol Tywyn)  
Councillor Gwynfor Owen (Ysgol Hafod Lon)  
Councillor Gwilym Jones (Ysgol Borthygest)

**Church Schools:** Joanna Thomas (Ysgol y Faenol)

**Special Schools:**

**Diocese:**

**Teachers' Unions:** Clive Thomas (Ysgol Syr Hugh Owen)

**Observers:** Gwern ap Rhisiart (Head of Education Department)  
Debbie Anne Williams Jones (Assistant Head: Corporate Services)  
Kathy Bell (Schools Group Accountant)  
Ffion Edwards Ellis (Assistant Head: Special Educational Needs and Inclusion)

**Officers:** Rhodri Jones (Democracy Services Officer)

### 1. APOLOGIES

Apologies were received from:

- Dafydd Gibbard (Chief Executive)
- Dewi Morgan (Head of Finance Department)
- Donna Roberts (Specials Schools Representative)
- Robert Townsend (Representative for the Diocese)
- David Healy (Secondary Schools Advisor)
- Eifion Roberts (Governors: Meirionnydd)

## **2. DECLARATION OF PERSONAL INTEREST**

No declarations of personal interest were received.

## **3. URGENT ITEMS**

None to note.

## **4. MINUTES**

The Chair signed the minutes of the previous Forum meeting held on 30 September, 2024 as a true record.

## **5. MATTERS ARISING FROM THE MINUTES**

None to note.

## **6. FORUM MEMBERSHIP**

The Forum members were updated on new appointments to the Forum. Mr Kyle Jones (Ysgol yr Hendre) was welcomed to his first meeting of the Forum as a primary schools representative. It was also noted that Mr Robert Townsend had confirmed that he would be representing the Diocese on the Forum in the future.

## **7. SCHOOLS' BALANCES: 2023/24 FINANCIAL YEAR**

The report was submitted by the Schools Group Accountant.

It was explained that the report shared information about individual schools' balances on 31 March 2024, as well as the value of the balances as a percentage of the schools' budgets final allocation for the 2023/24 financial year.

It was confirmed that the schools' total balance was £8.5m which would be used from 1 April 2024 onwards to set the budget for 2024/25. She noted that approximately half of the total balances had been earmarked for setting this year's budgets. It was believed that the total balances would be quite different by the end of this financial year because of the Council's current financial situation.

Matters arising from the discussion:

A member gave thanks for the information and asked how much of the balances had been used to balance the budget for the following financial year, in order to find how much money remained for use by the schools. In response to the observations, the Group Accountant confirmed that schools' balances had been very high following the pandemic because of grants received following Covid-19. She explained that the grant funding was now being used up and that the level of balances was decreasing to be in line with pre-pandemic levels.

### **RESOLVED:**

**To accept the report, noting the observations made during the discussion.**

## **8. EDUCATION BUDGET AND SCHOOLS' ALLOCATIONS**

The report was submitted by the Schools Group Accountant.

It was explained that this report had been submitted to the Forum for information. She stated that the Education budget for 2024/25 was around £118m and that around £97m had been allocated to the schools in Gwynedd.

Data was presented on how the budget was allocated between the primary, secondary and special schools. She noted that the numbers of pupils in education in those sectors was the main driver that determined how the money was allocated. She detailed that approximately £6m had been allocated to special schools, £45m to primary schools and £42m to secondary schools (key stages 3 and 4). She explained that around £4m was allocated to secondary schools that had a sixth form on site (6 secondary schools in Arfon, and Ysgol Godre'r Berwyn, Meirionnydd).

Matters arising from the discussion:

The report was corrected to confirm that the actual budget of the Education Department was £117,900m.

It was noted that the 'IBA' indicator confirmed the Gwynedd Education budget to be £119m, and a member questioned where this extra £1m was being spent. In response to the question, the Head of Education Department confirmed that the IBA estimated indicator had been shared before political decisions were made, and that the Education Department's financial allocation had been determined by the Council.

It was mentioned that £1.5m had been earmarked for schools' quality services, and the member requested details about the services that received this funding. The Head of the Education Department confirmed that a large proportion of the funding was currently being allocated to GwE as the service was being restructured. He elaborated that a portion of the funding was spent on management in the Education Department and on curricular and professional development grants.

#### **RESOLVED:**

- **To accept the report, noting the observations made during the discussion.**
- **To hold a further discussion on the allocation to Schools Quality Services at the next meeting.**

#### **9. UPDATE: CHANGES TO THE ALN FUNDING METHOD**

The report was submitted by the Assistant Head: Special Educational Needs and Inclusion.

Members of the Forum were reminded of the need to allocate ALN funding based on needs and a formula rather than the Moderation Panel, following the lead of several other Local Authorities who had already taken this step. It was explained that this would lead to a more equitable system because the same formula would be used for all schools. It was clarified that this was based on using existing data. It was noted that they expected this change to provide greater security for schools, leading to creating job stability for assistants.

The Forum members were updated on the work that was taking place up to the end of March 2025.

It was explained that a transition period had been identified where a net had been set so that no school would see an increase or decrease of more than 50% to its current budget for the first year of the system. It was confirmed that all schools would fully transition to the system in the following year.

It was confirmed that further modelling, using the final data within the IDP, had been completed before recently releasing schools' projections. It was added that some schools had made contact with officers to confirm the scores that had been noted in the system. It was noted that the Assistant Head would have discussions with the Group Accountant to assess the need to update the figures and distribute them to each school to ensure all schools had the correct figures, or if schools wished to adjust figures.

She reported that they hoped to produce supporting documentation by the end of the term. She noted that schools would be able to use these as a handbook from March 2025 in order to familiarise themselves with the system.

She assured the forum that sessions would be offered to schools so that they could have discussions and receive guidance from officers. She explained that these would be taking place up to mid-February and would focus on ALN funding and its impact.

Matters arising from the discussion:

In response to a query regarding an increase in the ALN budget, the Assistant Head confirmed that there were no arrangements to increase the budget to date. She explained that this was because of financial challenges, but they hoped to receive grants from the Welsh Government to support the provision. It was confirmed that the new system merely adjusted how the budget was allocated rather than changing the total budget available.

A member asked how the new ALN funding arrangement would be reviewed to ensure the budget was being used in the best way for Gwynedd schools and pupils. In response to the enquiry, the Assistant Head confirmed that ongoing review was a statutory requirement, and a review report would be submitted annually when the system was operational. She elaborated that the first review report would be submitted in two years' time to ensure that the transitional period had passed before reviewing the arrangements further. It was emphasised that schools' input was key to the reviews to ensure that all feedback received consideration for the future.

#### **RESOLVED:**

**To accept the report, noting the observations made during the discussion.**

### **10. SCHOOLS' PROJECTIONS**

The report was submitted by the Schools Group Accountant.

She reported that a reduction of 182 may be seen in primary schools' pupil numbers which was equivalent to £338,000. She explained that a reduction in numbers led to a reduced budget for schools, before taking into account any potential, unavoidable financial cuts. She confirmed that no formal decision about cuts had been made to date.

She explained that a reduction in pupil numbers had a greater impact on schools' budget than any financial cuts. It was also confirmed that they were witnessing a reduction in pupil numbers in the secondary sector and the sixth forms.

It was confirmed that they were not seeing any change in the special schools at present, as pupil numbers were close to capacity. It was reported that the money allocated to the special schools had increased during the past two years, after a review of the severity of needs of the children attending the schools. The Forum members were reminded that the Council had protected special schools from cuts in the past, and it was noted that this might change in future depending on the financial situation over the coming years.

It was noted that a reduction of around £1.2m was expected, taking into account the budgets of both Cyngor Gwynedd and the Welsh Government. It was noted that this could lead to fewer members of staff within the schools, forcing schools to face redundancy processes in the future.

Matters arising from the discussion:

It was acknowledged that the primary sector had faced financial challenges in recent years because of a decrease in pupil numbers year on year. Concern was expressed that this decrease would affect the secondary sector as those pupils progressed with their education. It was considered whether the smallest secondary schools would be able to offer the full cross-section of the curriculum and also fund it? It was confirmed that initial engagement on the Education Strategy had taken place this year, and that the Department would engage further in January 2025. It was hoped that this new Education Strategy would provide guidance for the next 10 years to be able to cope with the financial challenges.

The Head of Education Department confirmed that the reduction in pupil numbers was not only a rural problem, as it was affecting every school within the County. He noted that it was essential to ensure that firm strategic leadership was provided, supported by the new Cabinet Member for Education, as soon as possible so that the strategy could be operational as soon as possible.

**RESOLVED:**

**To accept the report, noting the observations made during the discussion.**

**11. ANY OTHER BUSINESS**

None to note.

**12. DATE FOR THE NEXT MEETING**

It was confirmed that the next meeting would be held on 17 February 2025 at 3:45pm. It was noted that the agenda would be published on 7 February 2025. It was explained that this date had been scheduled as it was timely as the Council sought to set a budget for the 2025/26 financial year. It was noted that reports will have been submitted to the Governance and Audit Committee (6 February 2025) and the Cabinet (11 February 2025) on the budget before presenting financial information to this Forum.

The meeting commenced at 3.45pm and concluded at 4.25pm.