

MEDIUM-TERM FINANCIAL PLAN
SAVING PROPOSAL- BUDGET IMPACT ASSESSMENT

DIRECTORATE:	Education and Corporate Services
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SERVICE AREA:	Learning, Education and Inclusion
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1. GENERAL INFORMATION

SAVING PROPOSAL TITLE:	50/50 Building maintenance (LA/Schools). Temporary savings proposal, recommendation to fund (to this value) from earmarked LMS Contingency balances in 2024/25.
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BUDGET AREA:	Education
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TOTAL BUDGET FOR THIS AREA:	£346,320
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TOTAL SAVING:	£346,320
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PLEASE PROVIDE A BRIEF DESCRIPTION OF HOW THE SAVING CAN BE ACHIEVED:
<p>Following the introduction of the Fair Funding Regulations in 2022, the Directorate retained a small residual budget to assist in supporting lower value capital schemes of work. This budget has typically been used to enhance the core capital programme by offering assistance on a 50/50 basis to support school projects (in-line with key maintenance priorities). Schools submit bids annually in the Autumn term for consideration for the following financial year.</p> <p>It is proposed that the full budget is taken as a temporary saving in 2024-25, with a review for future years. However, it is also proposed that in 2024-25, approval is sought to utilise ring-fenced LMS (Local Management of Schools) Contingency balances to support the full £346k (temporary saving). Subject to the appropriate approval this would ensure that there is no impact with regards to this savings proposal in 2024/25.</p>

2. PUBLIC IMPACT ANALYSIS

PLEASE DESCRIBE YOUR PLANS TO MITIGATE THE IMPACT UPON THE PUBLIC (where possible):
<p>Consider the 5 ways of working think about the <i>long-term</i> implications for future generations and <i>preventative services</i> while recognising that savings now will secure future services. NB* IT IS IMPORTANT TO RECOGNISE THE SIGNIFICANT FINANCIAL CHALLENGE FACING THE COUNCIL.</p> <p>Long-term guidance: Consider the importance of balancing short-term needs with the need to safeguard the ability to meet long-term needs, including the future financial sustainability of the Council.</p>

Currently the proposed saving of the full 50/50 maintenance budget (which matches with up to £346k from our schools) is for 1 year only. Subject to approval of the use of LMS Contingency balances in 2024/25 there would be no impact. However, it is acknowledged that to retain this savings proposal for future years would have an adverse impact on school buildings unless alternative funding was secured.

Prevention guidance: Consider whether the proposed saving is affecting a preventative area that reduces future burdens and supports well-being and how this can be mitigated if the service reduces, or ceases.

N/A

STATUTORY ASSESSMENTS

<p>DOES THE PROPOSAL HAVE THE POTENTIAL TO IMPACT MORE GREATLY ON PEOPLE WITH PROTECTED CHARACTERISTICS? (Please tick) (Reminder- AGE, DISABILITY, GENDER REASSIGNMENT, MARRIAGE or CIVIL PARTNERSHIP, PREGNANCY AND MATERNITY, RACE, RELIGION or BELIEF, SEX, SEXUAL ORIENTATION)</p>		<p>No</p>
<p>DOES THE PROPOSAL IMPACT ON PEOPLE WHO FACE SOCIO-ECONOMIC DISADVANTAGE? (Please tick) (Reminder- LOW INCOME/INCOME POVERTY, LOW WEALTH/OR NO WEALTH, MATERIAL DEPRIVATION, AREA DEPRIVATION, SOCIO-ECONOMIC BACKGROUND, and CUMULATIVE IMPACT OF THEM)</p>		<p>No</p>
<p>DOES THE PROPOSAL HAVE AN IMPACT ON THE WELSH LANGUAGE? (Please tick) (Reminder- OPPORTUNITIES TO USE THE LANGUAGE, PROMOTE THE LANGUAGE and/or TREATING THE WELSH LANGUAGE LESS FAVOURABLY THAN THE ENGLISH LANGUAGE)</p>		<p>No</p>

NB * If you answered 'yes' to the any of the above, please complete an Integrated Impact Assessment (IIA). For further advice and guidance please see the [Integrated Impact Assessment](#) page on the Intranet. This Budget Impact Assessment, or an IIA, if relevant, must be submitted to be included as hyperlinks to all decision reports related to the proposed savings. **IIAs are NOT required for nil public impact proposals.**

PLEASE DETAIL ANY CONSULTATION THAT HAS BEEN UNDERTAKEN IN CONSIDERING THIS PROPOSAL. Summarise any feedback received.

Consider the 5 ways of working, in particular, *involvement*.

Involvement: Consider whether you have involved people who have an interest in the service area, including service users and potential service users.

- Proposals discussed with Education SMT; Director, Head of Financial Services & S151;
- Cabinet Member and Leader of the Council.

Update following a period of public consultation:

The council's public consultation on the draft budget proposals for 2024/25 ran from Monday 22nd January 2024 until Tuesday 13th February 2024.

Residents and other stakeholder groups were invited to offer their views on the proposals in a number of ways. This included a survey (available online and in paper formats), attending face-to-face engagement sessions, using the council's online digital engagement platform and targeted stakeholder engagement with potentially impacted groups.

337 responses to the consultation were received by the closing date. A low response rate such as this comes with the caveat of self-selecting bias in the response and local media has focused attention on a small number of issues.

Face-to face conversations have had low levels of attendance (less than 10 visitors per session) with the exception of Caerphilly where over 40 people attended. A meeting was held with 9 Viewpoint Panel members and one person attended an online drop-in session.

The full consultation feedback report will be available at [Council Budget Setting 2024-2025 | The Caerphilly Conversation](#)

In responding to the survey, 45 responses were received opposing the proposal and 21 responses supported it. Discussions at face-to-face engagement sessions were very limited, although it was largely considered that any potential impacts on schools would be considered a negative.

IS FURTHER CONSULTATION REQUIRED BEFORE THIS PROPOSAL CAN BE IMPLEMENTED?	Complete	
NB* Please seek guidance from the Insights and Intelligence Team , who can advise on whether a formal consultation is required and adherence to the Gunning Principles.		

TAKING ACCOUNT OF THE ABOVE, THE IMPACT RATING DEFINITIONS, AND THE MITIGATION YOU ARE PLANNING, PLEASE INDICATE THE PUBLIC IMPACT RATING APPLICABLE TO THIS SAVING PROPOSAL (please tick):				
NIL IMPACT	MINOR IMPACT	MODERATE IMPACT	SIGNIFICANT IMPACT	CRITICAL IMPACT
x				

Nil subject to approval for use of LMS Contingency balances in 2024/25. If not approved moderate impact.

3. ORGANISATIONAL IMPACT ANALYSIS

PLEASE DESCRIBE YOUR PLANS TO MITIGATE THE IMPACT UPON THE ORGANISATION (where possible) :
e.g. gradual reduction in service, alternative delivery models, managing demand, more efficient use of assets, income generation, transferrable skills of staff, commercialisation of the service etc.
In addition, consider the 5 ways of working, in particular, acting in <i>collaboration</i> with other service areas or partners.
Collaboration guidance: Acting in collaboration with any other service or partner to meet objectives where they may be able to deliver a broadly equivalent service.
This would not be required if the use of LMS Contingency Balances are approved.

Collaboration with schools would then be able to continue on a 50/50 funding basis.

PLEASE DESCRIBE YOUR PLANS TO MITIGATE THE **IMPACT UPON MEMBERS OF STAFF**:

None, if the use of LMS Contingency Funds is approved.

NUMBER OF **FULL-TIME EQUIVALENT (FTE)**
STAFF IN THE PROJECT:

N/A

NUMBER OF **POSTS** IN THE PROJECT:
(Reminder- PLEASE ENSURE YOU HAVE SOUGHT THE
ADVICE OF PEOPLE SERVICES IN HOW TO MANAGE ANY
STAFFING CHANGES)

PLEASE SPECIFY HOW THIS WILL BE MANAGED:

HOW MANY POSTS?

POST(S) ALREADY VACANT:

VOLUNTARY SEVERANCE:

RETIREMENT:

REDEPLOYMENT:

REDUNDANCY:

PLEASE PROVIDE DETAILS OF WHEN THIS WILL
BE IMPLEMENTED:

WILL THE PROPOSED SAVING HAVE AN IMPACT ON ANOTHER
DIRECTORATE, SERVICE AREA OR TEAM WITHIN THE
COUNCIL? (please tick)

**No, if the use of LMS
Contingency Funds
are approved**

WILL THE PROPOSED SAVING HAVE AN IMPACT ON ANOTHER
PUBLIC SECTOR PARTNER, OR VOLUNTARY SECTOR PARTNER?
(please tick)

No

If yes to either of the above, please consider the 5 ways of working, in particular *integration*.

PLEASE DESCRIBE HOW THE SAVING CAN BE ACHIEVED IN A WAY THAT WILL MITIGATE THE IMPACT ON
OTHER SERVICE AREAS OR PARTNERS (**where possible**)

Integration guidance: Consider how the proposal will impact on other service areas, or partners, and their
ability to meet their objectives, recognising that the savings requirement on the Council may override some
concerns.

TAKING ACCOUNT OF THE ABOVE, THE IMPACT RATING DEFINITIONS, AND THE MITIGATION YOU ARE
PLANNING, PLEASE INDICATE THE **ORGANISATIONAL IMPACT RATING** APPLICABLE TO THIS SAVING
PROPOSAL (please tick):

NIL IMPACT	MINOR IMPACT	MODERATE IMPACT	SIGNIFICANT IMPACT	CRITICAL IMPACT
x				

Nil subject to approval for use of LMS Contingency balances in 2024/25. If not approved moderate impact.

4. LINKS TO POLICY AND CORPORATE OBJECTIVES

DOES THE SAVINGS PROPOSAL LINK TO ANY OF THE FOLLOWING?

POLICY AREA	WHAT IS THE LINK?
CORPORATE PLAN and WELL-BEING OBJECTIVES (please state which objectives)	No
STATUTORY DUTIES	No
WELSH GOVERNMENT GUIDANCE or STRATEGY	No

5. OTHER RISK(S) AND SENSITIVITIES

HAVE ANY <u>OTHER RISKS/SENSITIVITIES</u> BEEN IDENTIFIED IN CONNECTION WITH THIS SAVING PROPOSAL?		No
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PLEASE DESCRIBE ANY RELEVANT INFORMATION (Risks and Sensitivities) WHICH YOU FEEL HAS NOT BEEN CAPTURED.

HEAD OF SERVICE: ...Sue Richards.....

DATE OF COMPLETION: ...02/01/2024.....