

# Impact Assessment

## Schools Delegated Budget – Inflationary Pressures



Impact Assessments (IA) are a process of assessing how our proposals and decisions might impact upon different types of people and communities and developing proposals in line with relevant legislation.

This is a legal requirement, and ensures the Council considers key legislation, including Equalities, Welsh language, Future Generations, Socio-economic Duty and Risk when developing proposals.

It will also help the Council make the best possible decisions for the people of Powys.

## 1. Proposal Information

<b>Author Name</b>	Sarah Quibell
<b>Head of Service</b>	Georgie Bevan
<b>Portfolio Holder</b>	Cllr Pete, Cabinet Member for a Learning Powys
<b>Proposal title</b>	Schools Delegated Budget – Inflationary Pressures
<b>Description of proposal</b>	The Schools Delegated Budget will receive a 4.2% increase but this may not meet the pressures that are anticipated, which are largely as a result of pay awards and higher utility costs.

## 2. Savings and Consultation

### Profile of savings delivery

2023-24	2024-25	2025-26	2026-27	2027-28	2028+	Total Savings
0	0	0	0	0	0	0

### Further information

Despite a 4.2% increase in the schools delegated budget, there is an anticipated gap of **£2.5 million** as a result of pay and non-pay pressures, including utilities.

### Consultation requirements

<b>Consultation required?</b>	No
<b>Union consultation date</b>	N/A
<b>Staff consultation date</b>	N/A
<b>Public consultation date</b>	N/A
<b>Consultation plan (or justification where no consultation is required)</b>	
N/A	

### 3. Impact on other service areas, geographical areas, and data protection

#### 1a. Impact on other service areas

N/A

#### 1b. Impact on geographical locations

Schools in Powys

#### 1c. Data protection impact assessment

Will the proposal involve processing the personal details of individuals?

No

Is Powys County Council the data controller?

Choose an item.

Further information

N/A

### 4. Impact on well-being goals including Welsh language and equalities

#### 1d. A prosperous Wales

**Impact**

The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing in order to meet the costs and / or an increase in the number of schools with deficit budgets.

**Impact Rating**

Poor

## Mitigation

In order to support schools to deliver education with the existing funding envelope, the following mitigation is in place:

### **Delegated Funding Formula Review**

As part of the ongoing review of the school funding formula, proposals have been consulted on which, if approved, include a redistribution of £3.7 million notional Additional Learning Needs (ALN) delegated funding to schools, a factor for deprivation and amendments to the premises element of the formula so that a utility specific rate per square metre is introduced.

The ALN proposals will result in the removal of time consuming referral processes for schools, releasing staff time and enabling schools to more effectively plan support for learners.

The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:

- Create a more equitable provision for all learners across Powys
- Support the aspirations of the transformation programme
- Support all learners including helping offset the effects of disadvantage
- Support a collaborative schools' community which offers effective professional learning to facilitate the self-improving system.
- Support inclusion and bilingualism and promote access to excellence for all learners.

### **Transforming Education Programme**

Continued delivery of the Transforming Education Programme, which has four strategic aims:

- Strategic Aim 1: We will improve learner entitlement and experience
- Strategic Aim 2: We will improve learners and experience for post-16 learners
- Strategic Aim 3: We will improve access to Welsh-medium provision across all key stages
- Strategic Aim 4: We will improve the provision for learners with SEN / ALN

### **Energy Improvements**

The delivery of the Energy Improvements programme for schools will positively improve building efficiency and, therefore, benefit school expenditure.

The programme commenced in 2022-23 and continues during 2023-24, undertaking works including:

- Upgraded and new electrical, gas, water, and foul/waste infrastructure.
- Energy improvements, light emitting diode (LED) & emergency lighting, building management system (BMS) boiler controls, photovoltaic (PV) panels and battery storage.
- Roof and insulation upgrade improvements.

Further grant funding will be sought in future financial years to continue this work.

In addition, the Welsh Government have commissioned low carbon zero fabric and plant surveys for all school buildings in Wales in order to develop a strategic plan for decarbonising buildings. The surveys are taking place between January and June 2024.

Utilities awareness continues to be promoted with schools, and was, for example, included in the 2023-24 finance resource model (FRM) and budget process.

### **Support to Schools**

Schools will continue to be supported with:

- Finance surgeries
- Finance and curriculum deep dives to identify potential efficiencies and savings
- Encourage cluster / joint working including procurement to realise best value
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- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral

## **1e. A resilient Wales**

**Impact**

N/A

<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

## 1f. A healthier Wales

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing.
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Mitigated Rating

Neutral

## 1g. A Wales of cohesive communities

Impact

N/A



<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

## 1h. A globally responsible Wales

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**Mitigated Rating**

Neutral

## 1i. A Wales of vibrant culture and thriving Welsh language

### Using Welsh

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing, including in Welsh medium and dual stream schools.
<b>Impact Rating</b>	Poor

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**Mitigated Rating**

Neutral

## Promoting Welsh

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**Mitigated Rating**

Neutral

## Sports, Art & Recreation

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing, impacting activities such as sporting fixtures and enrichment opportunities.
<b>Impact Rating</b>	Poor

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**Mitigated Rating**

Neutral

## 1j. A more equal Wales

### Age

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Disability

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing.
<b>Impact Rating</b>	Poor

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**Mitigated Rating**

Neutral

### **Gender Reassignment**

**Impact**

N/A

<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Marriage or Civil Partnership

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Race

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Religion or belief

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Sex

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral



<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Sexual Orientation

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Pregnancy and Maternity

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

### Socio-economic Duty

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing, including support for disadvantaged learners.
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**Mitigated Rating**

Neutral

## 1k. Evidence

The School Delegated Budget Funding Formula Review Consultation and Cabinet Report.

School Budget Forum meeting minutes.

Formula Review Group meeting minutes.

The proposal and consultation documents for School Budget Forum.

The [Transforming Education](#) Programme.

The Energy Improvements programme for schools 2022-24.

Ongoing financial management support to schools.

## 5. Impact on key guiding principles & workforce

### 1l. Sustainable development principles

#### Long-term

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing, and impact on schools' ability to ensure sustainable and effective succession planning.
<b>Impact Rating</b>	Poor

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The Delegated Funding Formula undergoes continued review

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The delivery of the Energy Improvements programme for schools will positively improve building efficiency and, therefore, benefit school expenditure.

The programme commenced in 2022-23 and continues during 2023-24, undertaking works including:

- Upgraded and new electrical, gas, water, and foul/waste infrastructure
- Energy improvements, light emitting diode (LED) & emergency lighting, building management system (BMS) boiler controls, photovoltaic (PV) panels and battery storage.
- Roof and insulation upgrade improvements.

Further grant funding will be sought in future financial years to continue this work.

In addition, the Welsh Government have commissioned low carbon zero fabric and plant surveys for all school buildings in Wales in order to develop a strategic plan for decarbonising buildings. The surveys are taking place between January and June 2024.

Utilities awareness continues to be promoted with schools, and was, for example, included in the 2023-24 finance resource model (FRM) and budget process.

### **Support to Schools**

Schools will continue to be supported with:

- Finance surgeries
- Finance and curriculum deep dives to identify potential efficiencies and savings
- Encourage cluster / joint working including procurement to realise best value
- Encourage increased use of corporate contracts to realise best value
- The Schools Finance Benchmarking Tool and Finance Toolkit to enable schools to realise best value and share best practice in similar schools
- Schools finance training for headteachers, business managers and governors
- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral

## Collaboration

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for staffing, and, therefore, impact on schools' ability to work collaboratively to find shared and sustainable solutions.
<b>Impact Rating</b>	Poor

## Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

### **Delegated Funding Formula Review**

As part of the ongoing review of the school funding formula, proposals have been consulted on which, if approved, include a redistribution of £3.7 million notional Additional Learning Needs (ALN) delegated funding to schools, a factor for deprivation and amendments to the premises element of the formula so that a utility specific rate per square metre is introduced.

The ALN proposals will result in the removal of time consuming referral processes for schools, releasing staff time and enabling schools to more effectively plan support for learners.

The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:

- Create a more equitable provision for all learners across Powys
- Support the aspirations of the transformation programme
- Support all learners including helping offset the effects of disadvantage
- Support a collaborative schools' community which offers effective professional learning to facilitate the self-improving system.
- Support inclusion and bilingualism and promote access to excellence for all learners.

The Delegated Funding Formula undergoes continued review

### **Transforming Education Programme**

Continued delivery of the Transforming Education Programme, which has four strategic aims:

- Strategic Aim 1: We will improve learner entitlement and experience
- Strategic Aim 2: We will improve learners and experience for post-16 learners
- Strategic Aim 3: We will improve access to Welsh-medium provision across all key stages
- Strategic Aim 4: We will improve the provision for learners with SEN / ALN

### **Energy Improvements**

The delivery of the Energy Improvements programme for schools will positively improve building efficiency and, therefore, benefit school expenditure.



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- Upgraded and new electrical, gas, water, and foul/waste infrastructure
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- Schools finance training for headteachers, business managers and governors
- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral

## Involvement (including Communication & Engagement)

<b>Impact</b>	<p>Meaningful stakeholder engagement will continue to be undertaken as part of ongoing communication and collaboration with schools and key stakeholders.</p> <p>For example, the School Funding Formula proposals were in response to feedback from schools, who identified the need for ALN and deprivation funding to follow the learner. There will be schools, and therefore learners, who will significantly benefit from the changes. A reduction in administration for ALN processes should also positively impact schools.</p> <p>Schools who have cooking kitchens that export meals to other schools also raised that they were not reimbursed for their utilities expenditure.</p> <p>The proposed amendments seek to address the issues.</p> <p>The proposals underwent full consultation, ensuring that all schools and governing bodies had the opportunity to review and feedback on the proposals.</p> <p>It is proposed that the changes are phased in over 2 years, allowing schools greater time to plan for and implement the required changes..</p>
<b>Impact Rating</b>	Good
<b>Mitigation</b>	
<b>Mitigated Rating</b>	Choose an item.

## Prevention

<b>Impact</b>	<p>The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery, learner provision and staffing. This could impact on individual school's ability to ensure effective and sustainable provision.</p>
<b>Impact Rating</b>	Poor

## Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

### **Delegated Funding Formula Review**

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The ALN proposals will result in the removal of time consuming referral processes for schools, releasing staff time and enabling schools to more effectively plan support for learners.

The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:

- Create a more equitable provision for all learners across Powys
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- Support all learners including helping offset the effects of disadvantage
- Support a collaborative schools' community which offers effective professional learning to facilitate the self-improving system.
- Support inclusion and bilingualism and promote access to excellence for all learners.

The Delegated Funding Formula undergoes continued review

### **Transforming Education Programme**

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- Strategic Aim 3: We will improve access to Welsh-medium provision across all key stages
- Strategic Aim 4: We will improve the provision for learners with SEN / ALN

### **Energy Improvements**

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Utilities awareness continues to be promoted with schools, and was, for example, included in the 2023-24 finance resource model (FRM) and budget process.

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- School finance training for headteachers, business managers and governors
- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral

## Integration

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for staffing, impacting on schools' ability to work collaboratively with key partners.
<b>Impact Rating</b>	Poor

## Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

### **Delegated Funding Formula Review**

As part of the ongoing review of the school funding formula, proposals have been consulted on which, if approved, include a redistribution of £3.7 million notional Additional Learning Needs (ALN) delegated funding to schools, a factor for deprivation and amendments to the premises element of the formula so that a utility specific rate per square metre is introduced.

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- Schools finance training for headteachers, business managers and governors
- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral

## 1m. Impact on the workforce

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for staffing, and potentially result in a reduction of workforce.
<b>Impact Rating</b>	Poor



## Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

### **Delegated Funding Formula Review**

As part of the ongoing review of the school funding formula, proposals have been consulted on which, if approved, include a redistribution of £3.7 million notional Additional Learning Needs (ALN) delegated funding to schools, a factor for deprivation and amendments to the premises element of the formula so that a utility specific rate per square metre is introduced.

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The Delegated Funding Formula undergoes continued review

### **Transforming Education Programme**

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### **Energy Improvements**

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Utilities awareness continues to be promoted with schools, and was, for example, included in the 2023-24 finance resource model (FRM) and budget process.

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Schools will continue to be supported with:

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- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral

## 1n. Impact on payroll

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for staffing, and potentially lead to impact on payroll in relation to changes in the workforce.
<b>Impact Rating</b>	Poor

## Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

### **Delegated Funding Formula Review**

As part of the ongoing review of the school funding formula, proposals have been consulted on which, if approved, include a redistribution of £3.7 million notional Additional Learning Needs (ALN) delegated funding to schools, a factor for deprivation and amendments to the premises element of the formula so that a utility specific rate per square metre is introduced.

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The Delegated Funding Formula undergoes continued review.

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The programme commenced in 2022-23 and continues during 2023-24, undertaking works including:

- Upgraded and new electrical, gas, water, and foul/waste infrastructure
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- Roof and insulation upgrade improvements.

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Utilities awareness continues to be promoted with schools, and was, for example, included in the 2023-24 finance resource model (FRM) and budget process.

### **Support to Schools**

Schools will continue to be supported with:

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- Schools finance training for headteachers, business managers and governors
- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral

## 1o. Welsh language impact on Staff

<b>Impact</b>	The anticipated funding gap, including the ongoing increased cost of utilities, could result in schools redirecting funding for curriculum delivery and staffing, including in Welsh medium and dual stream schools.
<b>Impact Rating</b>	Poor

## Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

### **Delegated Funding Formula Review**

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The ALN proposals will result in the removal of time consuming referral processes for schools, releasing staff time and enabling schools to more effectively plan support for learners.

The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:

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The Delegated Funding Formula undergoes continued review

### **Transforming Education Programme**

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Utilities awareness continues to be promoted with schools, and was, for example, included in the 2023-24 finance resource model (FRM) and budget process.

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- Schools finance training for headteachers, business managers and governors
- Service Level Agreements (SLAs) for corporate services
- Support to enable them to maximise grant funding

**Mitigated Rating**

Neutral



## 1p. Impact on apprenticeships

<b>Impact</b>	N/A
<b>Impact Rating</b>	Neutral
<b>Mitigation</b>	N/A
<b>Mitigated Rating</b>	Neutral

## 1q. Evidence

The School Delegated Budget Funding Formula Review Consultation and Cabinet Report.  
School Budget Forum meeting minutes.  
Formula Review Group meeting minutes.  
The proposal and consultation documents for School Budget Forum.  
The [Transforming Education](#) Programme.  
The Energy Improvements programme for schools 2022-24.  
Ongoing financial management support to schools.

## 6. Likelihood and risks

### Risk 1

Schools are not able to deliver a comprehensive curriculum within the existing funding envelope, which could impact on learner provision and experience.

<b>Likelihood score</b>	3	<b>Impact score</b>	4	<b>Risk rating</b>	12
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### Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

- Current Delegated Funding Formula Review Proposals
- Ongoing review of the Delegated Funding Formula
- Transforming Education Programme
- Energy Improvements Programme for Schools 2022-24
- Ongoing financial support to schools

<b>Residual likelihood score</b>	3	<b>Residual impact score</b>	2	<b>Residual risk rating</b>	6
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## Risk 2

There is an increase in the number of schools with deficit budgets, which in turn could impact on the local authority's (LA's) overall fiscal position.

<b>Likelihood score</b>	4	<b>Impact score</b>	4	<b>Risk rating</b>	16
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## Mitigation

In order to support schools to deliver education and learner provision with the existing funding envelope, the following mitigation is in place:

- Current Delegated Funding Formula Review Proposals
- Ongoing review of the Delegated Funding Formula
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- Energy Improvements Programme for Schools 2022-24
- Ongoing financial support to schools
- Appropriate budget governance processes for schools, the service and the LA

<b>Residual likelihood score</b>	3	<b>Residual impact score</b>	3	<b>Residual risk rating</b>	9
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### Risk 3

The anticipated funding gap could result in schools redirecting funding for staffing, and potentially result in a significant reduction in the workforce and could lead to an associated skills deficit.

<b>Likelihood score</b>	3	<b>Impact score</b>	4	<b>Risk rating</b>	12
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### Mitigation

In order to support schools, the following mitigation is in place:

- Current Delegated Funding Formula Review Proposals
- Ongoing review of the Delegated Funding Formula
- Transforming Education Programme
- Energy Improvements Programme for Schools 2022-24
- Ongoing financial support to schools
- Appropriate budget governance processes for schools, the service and the LA
- HR support and advice

<b>Residual likelihood score</b>	3	<b>Residual impact score</b>	3	<b>Residual risk rating</b>	9
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### Risk 4

Click or tap here to enter text.

<b>Likelihood score</b>	Choose an item.	<b>Impact score</b>	Choose an item.	<b>Risk rating</b>	Choose an item.
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## Mitigation

Click or tap here to enter text.

**Residual likelihood score**

Choose an item.

**Residual impact score**

Choose an item.

**Residual risk rating**

Choose an item.

## Risk 5

Click or tap here to enter text.

**Likelihood score**

Choose an item.

**Impact score**

Choose an item.

**Risk rating**

Choose an item.

## Mitigation

Click or tap here to enter text.

**Residual likelihood score**

Choose an item.

**Residual impact score**

Choose an item.

**Residual risk rating**

Choose an item.

## 7. Overall summary and judgement

### Outline assessment

Whilst the Schools Delegated Budget will receive a 4.2% increase, this may not meet the pressures that are anticipated, and despite the increase, there is an anticipated gap of £2.44 million. The possible impact of the potential funding gap on schools is variable due to their differing financial positions and their ability to operate within their annual allocated funding.

As mitigation, there is a comprehensive and ongoing package of support that is available to schools, which has already resulted in schools already being able to submit appropriate budget recovery plans to the Local Authority.

The recent proposed formula and scheme changes will lead to a stable, transparent and fair funding arrangement for Powys learners and schools. These will create more equitable funding provision for all primary and secondary mainstream schools across Powys, supporting inclusion and all learners regardless of their additional learning needs or disadvantage. Risks to schools with a reduced level of funding will be mitigated by phasing in of the proposals, providing support for schools to reduce their costs and access to the wider “Team around the School” to support them with the transition.

Furthermore, the realisation of the Transforming Education agenda at pace, will positively impact on school budgets, effective per learner spend and the fulfilment of the Powys learner entitlement. It will also help mitigate the financial pressures linked to surplus school places that currently impact on school budgets.

#### Cabinet reference

Click or tap here to enter text.

## 8. Additional evidence

The School Delegated Budget Funding Formula Review Consultation and Cabinet Report.

School Budget Forum meeting minutes.

Formula Review Group meeting minutes.

The proposal and consultation documents for School Budget Forum.

The [Transforming Education](#) Programme.

The Energy Improvements programme for schools 2022-24.

Ongoing financial management support to schools.

## 9. Monitoring arrangements

Schools' finances will be monitored and reviewed with schools throughout the financial year, including twice-yearly finance surgeries, offer of deep dives and the ongoing analysis of the funding formula, allowing early intervention, support and guidance to be provided if required.

**Review date**

31/03/2025