

# Public Document Pack

## Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr

### Bridgend County Borough Council



Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont, CF31 4WB / Civic Offices, Angel Street, Bridgend, CF31 4WB

*Rydym yn croesawu gohebiaeth yn Gymraeg.  
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Annwyl Cyngorydd,

#### **CABINET**

Cynhelir Cyfarfod Cabinet Hybrid yn Siambr y Cyngor Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont ar Ogwr, CF31 4WB / o bell trwy Dimau Microsoft ar **Dydd Mawrth, 16 Ionawr 2024 am 14:30.**

#### **AGENDA**

1. Ymddiheuriadau am absenoldeb  
Derbyn ymddiheuriadau am absenoldeb gan Aelodau.
2. Datganiadau o fuddiant  
Derbyn datganiadau o ddiddordeb personol a rhagfarnol (os o gwbl) gan Aelodau / Swyddogion yn unol â darpariaethau'r Cod Ymddygiad Aelodau a fabwysiadwyd gan y Cyngor o 1 Medi 2008.
3. Cymeradwyaeth Cofnodion 3 - 10  
I dderbyn am gymeradwyaeth y Cofnodion cyfarfod y 19/12/2023
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5. Diweddariad Strategaeth Ariannol Tymor Canolig 2024-25 i 2027-28 43 - 114
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10. Polisiâu Cyfarwyddiaeth Gwasanaethau Cymdeithasol A Lles - Maethu Cymru Pen-y-bont ar Ogwr Polisi Cofnodi Gofalwyr Maeth a Maethu Cymru Polisi Cyllid Pen-y-bont ar Ogwr 157 - 200

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11. Materion Brys

I ystyried unrhyw eitemau o fusnes y, oherwydd amgylchiadau arbennig y cadeirydd o'r farn y dylid eu hystyried yn y cyfarfod fel mater o frys yn unol â pharagraff 2.4 (e) o'r Rheolau Trefn y Cabinet yn y Cyfansoddiad.

Nodyn: Bydd hwn yn gyfarfod Hybrid a bydd Aelodau a Swyddogion mynychu trwy Siambr y Cyngor, Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont ar Ogwr / o bell Trwy Timau Microsoft. Bydd y cyfarfod cael ei recordio i'w drosglwyddo drwy wefan y Cyngor. Os oes gennych unrhyw gwestiwn am hyn, cysylltwch â [cabinet\\_committee@bridgend.gov.uk](mailto:cabinet_committee@bridgend.gov.uk) neu ffoniwch 01656 643148 / 643694 / 643513 / 643696

Yn ddiffuant

**K Watson**

Prif Swyddog, Gwasanaethau Cyfreithiol a Rheoleiddio, AD a Pholisi Corfforaethol

**Dosbarthiad:**

Cynghorwyr

JC Spanswick

N Farr

W R Goode

Cynghorwyr

J Gebbie

HJ David

HM Williams

Cynghorwyr

JPD Blundell

Presennol

Y Cyngorydd HJ David – Cadeirydd

N Farr  
JPD Blundell

W R Goode

J Gebbie

HM Williams

Presennol Ar-lein

JC Spaswick

Swyddogion:

Carys Lord  
Claire Marchant  
Janine Nightingale  
Kelly Watson  
Lindsay Harvey  
Alex Rawlin  
Michael Pitman  
Oscar Roberts

Prif Swyddog - Cyllid, Perfformiad a Newid  
Cyfarwyddwr Corfforaethol Gwasanaethau Cymdeithasol a Llesiant  
Cyfarwyddwr Corfforaethol - Cymunedau  
Prif Swyddog Cyfreithiol, AD a Gwasanaethau Rheoleiddiol  
Cyfarwyddwr Corfforaethol Addysg a Chymorth i Deuluoedd  
Rheolwr Polisi Corfforaethol a Materion Cyhoeddus  
Swyddog Cymorth Technegol – Gwasanaethau Democrataidd  
Prentis Gweinyddol Busnes – Gwasanaethau Democrataidd

Datganiadau o Fuddiannau

Dim

**Cymeradwyo'r Cofnodion**

Penderfyniad a Wnaed	<b>PENDERFYNWYD:</b> Cymeradwyo cofnodion y Cabinet dyddiedig 21 Tachwedd 2023 fel cofnod gwir a chywir.
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

**270. Adolygu Polisi Gwirfoddolwyr**

Penderfyniad a Wnaed	<p>Cyflwynodd Cyfarwyddwr Corfforaethol Gwasanaethau Cymdeithasol a Llesiant Bolisi Gwirfoddoli newydd i'r Cabinet ei gymeradwyo.</p> <p>Mae'r polisi yn ceisio sicrhau bod gan y Cyngor drefniadau effeithiol ar waith ar gyfer gwirfoddoli. Mae'n darparu fframwaith ar gyfer pob cyfadran a maes gwasanaeth o fewn ac ar draws y Cyngor. Mae'n nodi cyfrifoldebau mewn perthynas â gwirfoddolwyr a dyletswyddau'r rheolwr tîm. Mae'n nodi'r dulliau a ddefnyddir i roi sicrwydd i'r Cyngor ei fod yn cyflawni ei ddyletswyddau a bod arferion effeithiol yn eu lle i gefnogi unigolion i ffynnu a bod yn rhan o'n cymuned lewyrchus.</p> <p>Ystyriodd a chymeradwyodd y Cabinet yr adroddiad, gan ddiolch i'r gwirfoddolwyr presennol am eu gwaith y mae gwirfoddolwyr yn ei wneud i'r fwrdeistref a nodi'r angen i sicrhau fframwaith da ar gyfer sefydliadau eraill y mae'r Cyngor yn eu cynnal gan ddefnyddio polisiâu tebyg. Mynegwyd pryderon ynghylch gwrthdaro posibl yn ymwneud â BAVO, ac eglurwyd bwriad y polisi gan y Cyfarwyddwr Corfforaethol Gwasanaethau Cymdeithasol a Llesiant fel un sy'n berthnasol i wirfoddolwyr sy'n gweithio'n uniongyrchol gyda CBS Pen-y-bont ar Ogwr yn unig.</p> <p><b>PENDERFYNWYD:</b> Bod y Cabinet yn cymeradwyo'r Polisi Gwirfoddolwyr sydd ynghlwm yn Atodiad 1 i'r adroddiad.</p>
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

**201. Arolygiad ar y Cyd o Drefniadau Amddiffyn Plant (JICPA) Ym Mhen-y-bont ar Ogwr 12-16 Mehefin 2023**

<p>Penderfyniad a Wnaed</p>	<p>Cyflwynodd Cyfarwyddwr Corfforaethol Gwasanaethau Cymdeithasol a Llesiant adroddiad arolygu'r Cydarolygiad o Drefniadau Amddiffyn Plant (JICPA) a gynhaliwyd ym Mhen-y-bont ar Ogwr yn ystod mis Mehefin 2023.</p> <p>Cynhaliwyd yr arolygiad gan Arolygiaeth Gofal Cymru (AGC), Arolygiaeth Gofal Iechyd Cymru (AGIC), Estyn ac Arolygiaeth Cwnstabiliaeth a Gwasanaethau Tân ac Achub Ei Mawrhydi (HMICFRS).</p> <p>Nododd a chymeradwyodd y Cabinet yr adroddiad, gan nodi ymhellach bod ymatebion yr arolygiad i gynlluniau gweithredu yn dilyn yr adroddiad wedi bod yn gadarnhaol, a diolchwyd i dimau perthnasol am eu gwaith yn ystod y cyfnod arolygu. Cydnabuwyd hefyd bwysigrwydd cadw diogelu fel cyfrifoldeb. Gofynnwyd am adroddiad dilynol o fewn chwe mis i nodi'r cynnydd.</p> <p><b><u>PENDERFYNWYD:</u></b> Bod y Cabinet yn nodi'r adroddiad ar y Cyd-Arolygiad o drefniadau Amddiffyn Plant ym Mhen-y-bont ar Ogwr a chamau gwella'r awdurdod lleol a nodwyd yn y Cynllun Gweithredu ar y Cyd.</p>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>19 Rhagfyr 2023</p>

**272. Polisi Atal a Rheoli Heintiau**

<p>Penderfyniad a Wnaed</p>	<p>Darparodd Cyfarwyddwr Corfforaethol Gwasanaethau Cymdeithasol a Llesiant drosolwg i'r Cabinet o ddatblygiad y polisi Heintiau, Atal a Rheoli arfaethedig ar gyfer Gwasanaethau Gofal Uniongyrchol Rheoleiddiedig a gofynnodd am gymeradwyaeth i weithredu'r polisi ar draws gwasanaethau gofal rheoledig a ddarperir gan y Gyfarwyddiaeth Gwasanaethau Cymdeithasol a Llesiant.</p> <p>Roedd yr adroddiad hwn yn crynhoi'r broses a'r rhesymau dros lunio a gweithredu'r polisi hwn. Roedd yn ofynnol creu polisi Heintiau, Atal a Rheoli yn dilyn cyhoeddi Hysbysiadau Gweithredu â Blaenoriaeth o arolygiadau diweddar Arolygiaeth Gofal Cymru (AGC) o wasanaethau rheoleiddiedig. Ysgrifennwyd y</p>
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	<p>polisi hwn yn unol â'r Llawlyfr Rheoli Heintiau Cenedlaethol.</p> <p>Trafododd y Cabinet bwysigrwydd angen polisi o'r fath. Ychwanegodd y Dirprwy Arweinydd fod Pandemig Covid 19 yn amlwg i hyn wrth i lawer o gartrefi gofal a chyfleusterau ei chael yn anodd darparu digon o PPE i staff.</p> <p>Ategodd yr Arweinydd y sylw hwn ac er ei fod yn ymddangos fel polisi di-nod, roedd yn hynod bwysig bod y mesurau hyn yn eu lle pe bai pob haint yn codi.</p> <p><b><u>PENDERFYNWYD:</u></b> Bod y Cabinet wedi cymeradwyo'r Polisi Heintiau, Atal a Rheoli i'w weithredu ar draws y gwasanaethau gofal a reoleiddir a ddarperir gan y Gyfarwyddiaeth Gwasanaethau Cymdeithasol a Llesiant.</p>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>19 Rhagfyr 2023</p>

**273. Datblygu Cynllun Cydraddoldeb Strategol 2024 - 2028**

<p>Penderfyniad a Wnaed</p>	<p>Gofynnodd y Prif Swyddog Cyllid, Perfformiad a Newid, am gymeradwyaeth y Cabinet i ddechrau ymgynghoriad cyhoeddus ar y Cynllun Cydraddoldeb Strategol drafft 2024-2028.</p> <p>Dywedodd fod yn rhaid i bob corff cyhoeddus yng Nghymru gydymffurfio â Chydraddoldeb y Sector Cyhoeddus. Un o'r dyletswyddau penodol yw cynhyrchu Cynllun Cydraddoldeb Strategol</p> <p>Dywedodd yr Aelod Cabinet Diogelwch Cymunedol a Lles fod hyn wedi'i gymeradwyo gan Bwyllgor y Cabinet ar Gydraddoldeb ym mis Tachwedd.</p> <p>Trafododd Aelodau'r Cabinet bwyntiau ynghylch ymgysylltu â phobl ifanc yn ogystal â'r rhai ag anableddau a rhoddwyd rhagor o wybodaeth am hyn gan y Prif Swyddog Cyllid, Perfformiad a Newid. Gofynnodd yr Arweinydd a oedd modd cynnal gweithdai hefyd yng Nghwm Ogwr a Chwm Garw</p> <p><b><u>PENDERFYNWYD:</u></b> Bod y Cabinet wedi cymeradwyo dechrau ymgynghoriad cyhoeddus ar y Cynllun Cydraddoldeb Strategol drafft 2024-2028 a nodi y bydd y Strategaeth derfynol yn cael ei</p>
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	hadrodd yn ôl i'r Cabinet maes o law i'w chymeradwyo.
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

**274. Strategaeth y Rhaglen Cymorth Tai (Strategaeth Digartrefedd) 2022 - 2026**

Penderfyniad a Wnaed	<p>Cyflwynodd y Prif Swyddog Cyllid Perfformiad a Newid Strategaeth derfynol y Rhaglen Cymorth Tai (Strategaeth Digartrefedd) 2022-2026 a Chynllun Gweithredu i'w cyflwyno i Lywodraeth Cymru. Roedd y rhain ynghlwm yn Atodiadau 1 a 2 i'r adroddiad.</p> <p>Bydd y ddogfen hon yn disodli Strategaeth Ddigartrefedd bresennol Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr 2018-2022. Roedd yn ofynnol gan Lywodraeth Cymru i'r strategaeth hon fod ar waith ym mhob Awdurdod Lleol.</p> <p>Yr Aelod Cabinet Tai, Cynllunio &amp; Dywedodd Adfywio bod cynnydd sylweddol mewn digartrefedd ac felly bod yr angen i ddarparu cymorth a gwasanaethau yn hynod bwysig. Roedd yn gobeithio y byddai Llywodraeth Cymru yn darparu'r cyllid angenrheidiol i CBS Pen-y-bont ar Ogwr barhau i gefnogi'r rhai sydd ei angen. Holwyd ac ymatebwyd i gwestiynau pellach gan y Prif Swyddog Cyllid, Perfformiad a Newid.</p> <p><b>PENDERFYNWYD:</b> Bod y Cabinet yn cymeradwyo Strategaeth Rhaglen Cymorth Tai (Strategaeth Digartrefedd) 2022-2026 (Atodiad 1 i'r adroddiad) a Chynllun Gweithredu (Atodiad 2) i'w cyflwyno i Lywodraeth Cymru, i gynnwys gwelliant y mae'r strategaeth yn ei gydnabod Y Siarter Rhiant Corfforaethol – Addewid i Gymru “Addewid Rhianta a Rennir”, y bydd yr ALI am ei fabwysiadu'n ffurfiol sy'n datgan “Cartref Sefydlog – Byddwn yn chwilio am leoedd sefydlog i fyw ac yn eu darparu sy'n addas i bob gofal. - plant a phobl ifanc profiadol. Mae hyn oherwydd bod gan bob plentyn hawl i amddiffyniad arbennig os nad yw'n byw gyda'i deulu (Erthygl 20).”</p>
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Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023
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**275. Polisi Gweithio Hybrid**

Penderfyniad a Wnaed	<p>Rheolwr Grŵp AD &amp; Cyflwynodd OD y Polisi Gweithio Hybrid diwygiedig i'r Cabinet ei gymeradwyo.</p> <p>Ym mis Hydref 2022, gweithredodd y Cyngor Bolisi Gweithio Hybrid interim. Roedd y polisi hwn yn gosod allan fframwaith ar gyfer gweithio hybrid yn y Cyngor ac wrth wneud hynny yn ceisio cefnogi'r Cyngor gyda'i fodel darparu gwasanaeth yn y dyfodol.</p> <p>Defnyddiwyd yr arolwg staff blynyddol a gynhaliwyd yn ystod Rhagfyr 2022 ac Ionawr 2023 i gael adborth gan staff gydag adran o gwestiynau yn ymdrin yn benodol â gweithio hybrid.</p> <p>Roedd adborth gan staff drwy'r arolwg staff mewn perthynas â gweithio hybrid yn gadarnhaol. Cadarnhaodd 62% o ymatebwyr fod eu rolau gwaith yn amodol ar y polisi gweithio hybrid interim newydd a gyflwynwyd ym mis Hydref 2022. Roedd 72% o ymatebwyr yn cytuno'n gryf neu'n cytuno eu bod yn fodlon bod y polisi hybrid interim newydd yn cefnogi trefniadau gwaith a oedd yn eu galluogi i wneud hynny. cwrdd â gofynion gwaith. Roedd 70% o'r ymatebwyr yn cytuno'n gryf neu'n cytuno bod y cynllun oriau gwaith hyblyg a gweithio hybrid yn caniatáu iddynt gael cydbwysedd da rhwng bywyd a gwaith.</p> <p>Holodd y Dirprwy Arweinydd a oedd man gwaith y contractau ar gyfer staff wedi'i restru fel cyfeiriad cartref. Rheolwr Grŵp AD &amp; Cadarnhaodd OD nad oedd hyn yn wir. Ystyriwyd mai'r Swyddfeydd Dinesig oedd y prif weithle ar gyfer holl staff y swyddfa a bydd eu contractau'n adlewyrchu hyn.</p> <p><b><u>PENDERFYNWYD:</u></b> Bod y Cabinet yn cymeradwyo'r Polisi Gweithio Hybrid i'w weithredu'n llawn.</p>
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

**276. Adroddiad Gwybodaeth i'w Nodi**

Penderfyniad a Wnaed	Cyflwynodd y Prif Swyddog Gwasanaethau Cyfreithiol a Rheoleiddiol, Adnoddau Dynol a Pholisi
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	<p>Corfforaethol Adroddiad Gwybodaeth i'w nodi, sydd wedi'i gyhoeddi ers ei gyfarfod arferol diwethaf. Roedd yr adroddiad yn rhoi manylion y polisi presennol o dan Ddeddf Rheoleiddio a Phwerau Ymchwilio 2000 (RIPA).</p> <p><b><u>PENDERFYNWYD:</u></b> Bod y Cabinet yn cydnabod cyhoeddi'r adroddiad Gwybodaeth y cyfeiriwyd ato ym mharagraff 3.1 yr adroddiad.</p>
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

**277. Eitemau Brys**

Penderfyniad a Wnaed	Dim
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

**278. Gwahardd y Cyhoedd**

Penderfyniad a Wnaed	<p><b><u>PENDERFYNWYD:</u></b> Nid oedd yr eitem ganlynol i'w chyhoeddi gan ei bod yn cynnwys gwybodaeth eithriedig fel y'i diffinnir ym Mharagraffau 14 o Ran 4 a Pharagraff 21 o Ran 5, Atodlen 12A o Ddeddf Llywodraeth Leol 1972, fel y'i diwygiwyd gan Ddeddf Llywodraeth Leol (Mynediad at Wybodaeth) ( Gorchymyn Amrywio) (Cymru) 2007.</p> <p>Yn dilyn cymhwyso prawf budd y cyhoedd, penderfynodd y Cabinet yn unol â'r Ddeddf i ystyried yr eitem hon yn breifat, gyda'r cyhoedd yn cael eu gwahardd o'r cyfarfod yn ystod ystyriaeth o'r fath.</p>
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

**Cymeradwyo Cofnodion Eithriedig**

Penderfyniad a Wnaed	<b><u>PENDERFYNWYD:</u></b> Cymeradwyo cofnodion eithriedig y Cabinet dyddiedig 21 Tachwedd 2023 fel cofnod gwir a chywir.
Dyddiad y Gwnaed y Penderfyniad	19 Rhagfyr 2023

I weld trafodaethau pellach a gynhaliwyd ar yr eitemau uchod, cliciwch ar y [ddolen](#) hon

Terfynwyd y cyfarfod yn 4:00pm

# Agenda Item 4

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>16 JANUARY 2024</b>
<b>Report Title:</b>	<b>BUDGET MONITORING 2023-24 – QUARTER 3 REVENUE FORECAST</b>
<b>Report Owner/ Corporate Director:</b>	<b>CHIEF OFFICER – FINANCE, PERFORMANCE AND CHANGE</b>
<b>Responsible Officer:</b>	<b>JOANNE NORMAN GROUP MANAGER – BUDGET MANAGEMENT</b>
<b>Policy Framework and Procedure Rules:</b>	<b>As required by section 3 (budgetary control) of the Financial Procedure Rules, Chief Officers in consultation with the appropriate Cabinet Member are expected to manage their services within the approved cash limited budget and to provide the Chief Finance Officer with such information as is required to facilitate and monitor budgetary control.</b>
<b>Executive Summary:</b>	<ul style="list-style-type: none"><li>• <b>The net revenue budget for 2023-24 is £342.334 million. The overall projected position at 31st December 2023 is a net over spend of £10.287 million.</b></li><li>• <b>The projected over spend is primarily due to ongoing pressures within the Social Services and Wellbeing Directorate, Home to School Transport and homelessness.</b></li><li>• <b>The budget approved for 2023-24 included budget reduction proposals totalling £2.608 million. The current position is a projected shortfall on the savings target of £246,000, or 9.43% of the overall reduction target.</b></li></ul>

## **1. Purpose of Report**

- 1.1 The purpose of this report is to provide Cabinet with an update on the Council's revenue financial position as at 31st December 2023.

## **2. Background**

- 2.1 On 1st March 2023, Council approved a net revenue budget of £342.047 million for 2023-24 based on the provisional local government settlement received from Welsh

Government in December 2022. The Welsh Government announced its final settlement on 28th February 2023 which included an increase in the Revenue Support Grant (RSG) for the Council of £287,106, increasing the net revenue budget for 2022-23 to £342.334 million. The reasons for this increase were outlined in a report to Council on 15th March 2023, but were mainly in respect of the transfer into the final local government settlement of the Fire and Rescue Authority (FRA) Scape grant.

2.2 As part of the Performance Management Framework, budget projections are reviewed regularly and reported to Cabinet on a quarterly basis. The delivery of agreed budget reductions is also kept under review and reported to Cabinet as part of this process.

### 3. Current situation / proposal

#### 3.1 Summary financial position at 31st December 2023

3.1.1 The Council's net revenue budget and projected outturn for 2023-24 is shown in Table 1 below.

**Table 1- Comparison of budget against projected outturn at 31st December 2023**

Directorate/Budget Area	Original Budget 2023-24 £'000	Revised Budget 2023-24 £'000	Projected Year end spend Q3 2023-24 £'000	Projected Over / (Under) Spend 2023-24 £'000	Projected Over / (Under) Spend Qtr 2 2023-24 £'000
<b>Directorate</b>					
Education and Family Support	137,488	145,800	146,939	1,139	1,746
Social Services and Wellbeing	92,791	99,316	111,900	12,584	12,690
Communities	30,545	34,532	34,781	249	600
Chief Executive's	24,003	25,410	26,675	1,265	248
<b>Total Directorate Budgets</b>	<b>284,827</b>	<b>305,058</b>	<b>320,295</b>	<b>15,237</b>	<b>15,284</b>
<b>Council Wide Budgets</b>					
Capital Financing	7,203	7,142	4,233	(2,909)	(2,598)
Levies	9,189	9,189	9,180	(9)	(19)
Apprenticeship Levy	650	750	788	38	19
Council Tax Reduction Scheme	16,054	16,054	15,603	(451)	(213)
Insurance Premiums	1,363	1,363	1,238	(125)	(102)
Repairs & Maintenance	670	670	630	(40)	(40)
Pension Related Costs	430	430	457	27	0
Other Council Wide Budgets	21,948	1,678	197	(1,481)	(1,399)
<b>Total Council Wide Budgets</b>	<b>57,507</b>	<b>37,276</b>	<b>32,326</b>	<b>(4,950)</b>	<b>(4,352)</b>
<b>Total</b>	<b>342,334</b>	<b>342,334</b>	<b>352,621</b>	<b>10,287</b>	<b>10,932</b>

3.1.2 The overall projected position at 31st December 2023 is a net over spend of £10.287 million comprising £15.237 million net over spend on directorates and a net under spend of £4.950 million on Council wide budgets. A detailed analysis of the more significant projected under and over spends is set out in section 3.3.

- 3.1.3 The overall projected position has improved since the net projected over spend of £10.932 million reported at quarter 2. In October, the Chief Executive wrote to all members of staff to indicate that new measures were being introduced, as modelling suggested that a total of £20 million of cuts may be required to address the 2023-24 over spend as well as to fund new budget pressures in 2024-25. These included a selective vacancy freeze, not entering into any new contracts or purchasing new equipment unless absolutely necessary, and maximisation of grant and fee income. There has been a reduction in the number of roles advertised in quarter 3 of 17.1% compared to quarter 2 and a 26.9% reduction when compared to quarter 3 in 2022-23. Where these measures have positively impacted on projections, this has been set out in section 3.3.
- 3.1.4 The main financial pressures are in the service areas of Social Services and Wellbeing (SSWB), Home to School Transport (HtST) and Homelessness. In 2022-23, the SSWB Directorate experienced pressures of work to meet statutory duties against a backdrop of an exponential increase in demand in children's social care, and an increase in the number of independent residential placements in Children's Services, along with pressures in learning disabilities and older persons' residential placements. Whilst budget growth of £8.174 million was approved by Council as part of the Medium Term Financial Strategy (MTFS) for 2023-24, a significant proportion of this was to address the implementation of the Real Living Wage for care workers. The SSWB Directorate continues to see an increase in demand and this budget growth is currently insufficient to meet the increase in demand, with current projections showing a £12.584 million over spend in 2023-24. A 3 year sustainability plan to improve outcomes for Children and Family Services in Bridgend was approved by Council on 20th September 2023, with a budget virement of £1 million approved for Children's services and the additional use of up to £2.5 million of earmarked reserves whilst a more permanent funding solution is sought.
- 3.1.5 There is a projected over spend on Home to School Transport of £1.157 million. Several retendering exercises on HtST took place in 2022-23 with market conditions not being favourable, due to high levels of inflation and shortage of drivers and escorts. These procurement exercises resulted in generally higher costs across many contracts.
- 3.1.6 Budget growth of £2.192 million was approved by Council as part of the Medium Term Financial Strategy (MTFS) budget setting process in February 2021 with a further £700,000 approved in March 2023, to continue the commitment to focus support for homeless individuals. However, the Council has seen a significant increase in the provision of temporary accommodation, from 232 households and 436 individuals in November 2022 to 299 households and 559 individuals in November 2023. There is a projected over spend on Housing & Homelessness of £538,000 at quarter 3.

#### **Budget virements/technical adjustments**

- 3.1.7 There have been a number of budget virements and technical adjustments between budgets since the Medium Term Financial Strategy (MTFS) was approved by Council in March 2023. The budget position is reported on the assumption that these virements will be approved.

3.1.8 The other main virements and technical adjustments since quarter 2 are outlined below:

#### Budget Virements

<b>Service vired from / to</b>	<b>Amount</b>
Transfer of funding from the Capital Financing budget to Communities Directorate to cover the cost of prudential borrowing for highways maintenance schemes as agreed when the capital funding was approved.	£60,893

#### Technical Adjustments

<b>Service vired from / to</b>	<b>Amount</b>
Allocation of funding retained centrally in respect of National Joint Council (NJC) pay award 2023-24 for school employees – confirmed in November 2023	£2,551,490
Allocation of funding retained centrally in respect of National Joint Council (NJC) pay award 2023-24 for directorate employees – confirmed in November 2023	£5,521,330
Allocation of funding retained centrally in respect of teachers' pay award 2023-24 (covering September 2023 to March 2024)	£2,466,750
Transfer of inflationary uplifts not confirmed when the Medium Term Financial Strategy was agreed that are held centrally until evidence of the uplift is provided by the service areas (detailed in paragraph 3.1.11).	£1,338,076

#### Pay/Price Inflation

3.1.9 When the budget for 2023-24 was set, very little funding was allocated to directorates for pay and price inflation, as most had not been determined for the forthcoming year. The majority of the provision was retained centrally within Council wide budgets, to be allocated as further information was known about specific contractual price increases. The technical adjustments table above outlines the amounts released from these budgets during quarter 3, based upon confirmed pay awards and evidenced price inflationary uplifts.

3.1.10 The adjustments to pay budgets reflect agreement on pay claims for Teachers' pay and National Joint Council employees, both of which were agreed in recent months.

3.1.11 Price inflationary uplifts include £0.605 million for Home to School Transport contracts, £0.523 million inflationary uplift on the waste collection contract, and £0.105 million for software increases in line with the Consumer Price Index (CPI).

3.1.12 The Council has experienced additional costs as a result of increases in inflation not seen for over a decade, partly as a consequence of the impact of the war in the Ukraine.

3.1.13 There is therefore no further funding available for any more unexpected major pay/price inflation increases. Inflation rates have remained high for most of

2023-24 with CPI at 6.7% in August 2023. Whilst CPI reduced to 3.9% in November, its lowest level in two years, prices remain substantially above what they were before the war in Ukraine began in February 2022 and the budget will need to be monitored closely during the remainder of the year and going into 2024-25.

### **Budget Reduction Proposals**

- 3.1.14 The net budget for the financial year has been set assuming full implementation of the current year budget reduction requirements across the Council's budget, which amount to £2.608 million. Where proposals to meet this requirement have been delayed or are not achievable directorates have been tasked with identifying alternative proposals to meet their requirements such as vacancy management, or bringing forward alternative budget reduction proposals.
- 3.1.15 In March 2023 Council approved the Medium Term Financial Strategy for 2023-24 to 2026-27. This identified the need to develop recurrent budget reduction proposals, based on the most likely scenario, amounting to £17.165 million over the next four years. However, it has become evident in recent months that the position going forward is likely to be even more challenging than this, with recurrent in-year over spends needing to be mitigated, along with additional pay and price pressures. Against that background it is essential that expenditure is kept within the overall approved budget as far as possible, and that longer term proposals continue to be developed so that the Council has as much flexibility as possible to meet the challenges which lie ahead. Likewise, any opportunities to reduce spend in-year will continue to be taken to try and improve the year end position.
- 3.1.16 At year end consideration will be given to any budget over spends to determine whether these should be carried forward as a first call on the directorate budget for the following year. Similarly, consideration will be given to requests from Corporate Directors to carry forward any planned directorate under spends for specific purposes into the following year, in line with the Council's Reserves and Balances Protocol. However given the quarter 3 overall projected over spend for the Council, and that carry forward of planned under spends can only be approved as long as they can be met from within the Council's cash limited budget for 2023-24, it is unlikely that there will be capacity to establish new, or increase existing, earmarked reserves at year-end. This is in line with the reports to Cabinet and Council on the MTFs, and the Council's Financial Procedure Rules.
- 3.1.17 If over spends are due to budget reduction proposals not being achieved, Corporate Directors will be asked to identify if any of these proposals are still not likely to be achieved in full during the 2024-25 financial year, and to identify mitigating actions that will be undertaken to achieve them.

## **3.2 Monitoring of Budget Reduction Proposals**

### **Prior Year Budget Reductions**

- 3.2.1 A report was presented to Cabinet on 20th June 2023 on the Revenue Budget Outturn 2022-23. In the report it was highlighted that, for 2017-18 to 2021-22, there were £179,000 of budget reduction proposals that were not met in full, with a total outstanding balance to be met of £60,000. In addition, of the 2022-23 budget reduction proposals of £631,000, it was reported that there was a total outstanding

balance to be met of £176,000. Corporate Directors have been asked to identify if any of these proposals are still not likely to be achieved in full during the 2023-24 financial year, and to identify mitigating actions that will be undertaken to achieve them. All remaining outstanding prior year budget reductions are summarised in **Appendix 1** with a summary per directorate provided in Table 2.

**Table 2 – Outstanding Prior Year Budget Reductions**

	<b>Total Budget Reductions Required</b>	<b>Total Budget Reductions Likely to be Achieved</b>	<b>Shortfall</b>
<b>DIRECTORATE /BUDGET REDUCTION AREA</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Social Services and Wellbeing	115	115	0
Communities	165	0	165
<b>TOTAL</b>	<b>280</b>	<b>115</b>	<b>165</b>

*Note: The total budget reductions required in Table 2 represents the full original budget reduction targets.*

3.2.2 Table 2 shows that of the £280,000 outstanding reductions, £115,000 is likely to be achieved in 2023-24 leaving a shortfall of £165,000. Proposals still not likely to be achieved include:

- COM 2 – Re-location of Community Recycling Centre from Tythegston to Pyle (£60,000 shortfall). Positive progress has been made with Natural Resources Wales in relation to the licence at the new site in Pyle, however both sites will be maintained until the new site is fully operational, therefore the saving will not be implemented until mid-way through 2024-25.
- COM 3 – change the composition of household food waste bags (£35,000 shortfall). The budget reduction proposal was delayed until the outcome of national research had been completed to ensure any potential changes in legislation did not impact on this proposal. The new waste contractors from 1st April 2024 have been advised of the change of composition, therefore the saving will be made in full during 2024-25.
- COM 4 – remove Business in Focus from running Enterprise Centres in Bridgend (£20,000 shortfall). The review of the Business in Focus continues to be explored to identify operating efficiencies.
- COM 5 – commercially let a wing of Ravens Court to a partner organisation of business (£50,000 shortfall). Demand for office space at this time is limited, the re-letting market is extremely challenging and investment is required on the heating and ventilation system in Ravens Court before being able to lease the building. It is intended to accelerate shared use of space with public sector partners, in particular South Wales Police in the Civic Offices, in 2024-25

3.2.3 As outlined in the MTFs reports to Cabinet and Council, MTFs Principle 7 states that “Savings proposals are fully developed and include realistic delivery timescales



prior to inclusion in the annual budget. An MTFs Budget Reduction Contingency Reserve will be maintained to mitigate against unforeseen delays". An MTFs Budget Reduction Contingency reserve was established in 2016-17. This reserve has been used to meet specific budget reduction proposals in previous years on a one-off basis pending alternative measures. There are no plans to draw down from this reserve in 2023-24, and the reserve will be maintained to offset future budget reduction shortfalls due to the challenging budgetary position going forward.

### **Budget Reductions 2023-24**

3.2.4 The budget approved for 2023-24 included budget reduction proposals totalling £2.608 million, which is broken down in **Appendix 2** and summarised in Table 3 below. The current position is that £2.358 million has been achieved to date with only a further £4,000 in savings likely to be achieved by year end, leading to an overall projected shortfall on the savings target by year end of £246,000, or 9.43% of the overall reduction target.

**Table 3 – Monitoring of Budget Reductions 2023-24**

	Total Budget Reductions Required	Total Budget Reductions Achieved to date	Total Budget Reductions Likely to be Achieved	Shortfall
DIRECTORATE /BUDGET REDUCTION AREA	£'000	£'000	£'000	£'000
Education and Family Support	40	0	0	40
Schools	2,118	2,118	2,118	0
Social Services and Wellbeing	0	0	0	0
Communities	375	165	169	206
Chief Executive's	75	75	75	0
<b>TOTAL</b>	<b>2,608</b>	<b>2,358</b>	<b>2,362</b>	<b>246</b>

3.2.5 The most significant budget reduction proposals unlikely to be achieved in full are:-

- EDFS1 – Delegation of school transport responsibilities to The Bridge Pupil Referral Unit (£40,000 shortfall). Officers are continuing to investigate the practicalities and implications of this bespoke transport arrangement.
- COM1 – closure of each of the Community Recycling Centre sites for one weekday per week (£46,000 shortfall). Public consultation on this proposal was undertaken between 30th June and 12th September 2023, with the outcome reported to Cabinet on 21st November 2023, when the proposal was approved. The current waste contractor is in the process of implementing this saving, and a marginal saving will be made in 2023-24, with the full saving being realised in 2024-25.
- COM 2 – Charging Blue Badge Holders for parking (£40,000 shortfall). The traffic management team have been engaged in the introduction of the national speed limit (20mph) in built up areas, and therefore the saving proposal is unlikely to be achieved in 2023-24 due to the resource required to introduce this change first.
- COM5 – commercially let a wing of Ravens Court to a partner organisation or business (£120,000 shortfall) – Demand for office space at this time is limited, the re-letting market is extremely challenging and investment is required on the heating and ventilation system in Ravens court before being able to lease the building. It is

intended to accelerate shared use of space with public sector partners, in particular South Wales Police in the Civic Offices, in 2024-25.

3.2.6 **Appendix 2** identifies the projected amount of saving against these proposals in detail and action to be taken by the directorate to mitigate the shortfall. Corporate Directors continue to work with their staff to deliver their proposals or alternatives and this is reflected in the forecast outturn for the year.

3.2.7 In the longer term, these proposals must be realised or must be met through alternative budget reduction proposals in order to deliver a balanced budget position.

### 3.3 **Commentary on the financial position at 31st December 2023**

#### **Financial position at 31st December 2023**

A summary of the financial position for each main service area is attached in **Appendix 3** to this report and comments on the most significant variances are provided below.

#### 3.3.1 **Education and Family Support Directorate**

The net budget for the Education and Family Support Directorate, including school delegated budgets, for 2023-24 is £145.800 million. Current projections indicate an over spend of £1.139 million at year end. The main variances are:

<b>EDUCATION &amp; FAMILY SUPPORT DIRECTORATE</b>	<b>Net Budget</b>	<b>Projected Outturn</b>	<b>Projected Variance Over/(under) budget</b>	<b>% Variance</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	
Learner Support	6,935	7,663	728	10.5%
Family Support	3,602	3,273	(329)	-9.1%
Home to School Transport	8,625	9,782	1,157	13.4%
Catering Services	2,195	2,083	(112)	-5.1%
Corporate health and safety	411	280	(131)	-31.9%

#### **Schools' delegated budgets**

Total funding currently delegated to schools in 2023-24 is £116.015 million.

The schools' delegated budget is reported as balanced as any under spend or over spend is automatically carried forward into the new financial year before being considered by the Corporate Director - Education and Family Support in line with the 'Guidance and Procedures on Managing Surplus School Balances'.

At the start of 2023-24, projections indicated an overall surplus balance for school delegated budgets of £221,890 at year end. At quarter 2 this reduced to a £72,960 projected surplus. At quarter 3 this had reduced to an overall projected deficit of £167,593. There are 22 primary schools, 1 secondary school and 2 special schools (47% of all schools) projecting a deficit balance at year end.

## **Central Education and Family Support Directorate budgets**

### Learner Support

- There is a projected net over spend of £728,000 in Learner Support budgets. This primarily relates to a projected over spend on the inter-authority recoupment budget due to an increase in demand for Bridgend pupils in out of county placements from 16 in Summer 2022 up to 21 for Summer 2023 and 22 in Autumn 2023 (£478,000) as there are insufficient spaces at Heronsbridge and Ysgol Bryn Castell. The balance mainly relates to a projected increase in demand for additional learning needs support at schools, in particular complex medical needs, sensory support and communication and relationship support.

### Family Support

- The projected under spend of £329,000 primarily relates to staff vacancies and receipt of additional grant funding. The two additional grants are the Youth Endowment Fund (£262,000 – 18 months from September 2023 to March 2025) and the Turnaround grant (£59,000 – two years, ending March 2025). The under spend has increased from the £280,000 projected at quarter 2 due to the selective recruitment freeze.

### Home-to-school transport (HtST)

- The revenue outturn report for 2022-23 highlighted a £1.316 million over spend on the HtST budget. This was primarily as a result of retendering exercises that had taken place, which had been impacted by unfavourable market conditions. This had subsequently resulted in higher costs across many contracts in line with difficulties associated with the aftermath of the pandemic, namely the shortage of drivers and escorts and increased fuel costs internationally.
- The HtST budget is projecting a similar projected over spend for 2023-24 of £1.157 million.

### Catering Services

- There is a projected under spend of £112,000 in Catering Services which has significantly improved from the projected over spend of £390,000 reported at quarter 2. This is mainly due to the receipt of a working balance of £237,000 from Paypoint who administered Free School Meal holiday vouchers on behalf of the authority until the end of the May half term holiday. The deposit was held open until quarter 3 to maximise the number of vouchers that had been issued being redeemed by families. Without this, Catering Services would be projecting an over spend of £125,000.
- Secondly, Welsh Government announced on 20th December that they had completed their review on the Universal Primary Free School Meals (UPFSM) unit rate and had agreed an increase per meal to £3.20 from £2.90 effective from January 2024. However, in recognising the additional costs incurred in delivering the UPFSM offer at pace, additional funding will also be released in 2023-24. This has improved the projections since quarter 2 by £148,000.
- Price inflation on food has been particularly volatile in 2023-24, with a recent reduction in food inflationary levels seen. The cost of food purchases will be closely monitored for the remainder of 2023-24, and into 2024-25 to determine whether the inflationary pressures in this area continue to impact on cost recovery in this service area.

#### Corporate Health and Safety Unit

- The projected under spend of £131,000 within the Corporate Health and Safety Unit primarily relates to staff vacancies. The projected under spend has increased since the £36,000 reported at quarter 2 due to current vacancies being placed on hold in light of the selective recruitment freeze.

### 3.3.2 Social Services and Wellbeing Directorate

The Social Services and Wellbeing Directorate's net budget for 2023-24 is £99.316 million. Within that, Council approved budget pressures of £8.174 million as part of the Medium Term Financial Strategy.

This funding was used to support :

- £2.5 million for Real Living Wage for care workers ;
- inflationary uplifts on commissioned contracts ;
- demographic pressures ;
- Children's Residential and Independent Residential Care ;
- Learning Disabilities ;
- strengthening of leadership in response to challenging Care Inspectorate Wales inspections ;
- workforce pressures to safeguard and protect children.

In 2023-24 the Directorate has continued to experience service and financial pressures in meeting statutory duties with a backdrop of a continued exponential increase in demand in Children's social care which impacts on the workforce required and a further increase in the number of independent residential placements in Children's services. This includes a small number of placements at any time which are Operating Without Registration (OWR). Given the additional risks of children living in settings without the protection accorded by regulation, these placements are risk managed and have higher staff ratios, which drive the cost of the service. A 3 year sustainability plan to improve the way that children and families are supported in Bridgend was agreed by Council on 20th September 2023. The financial implication of this plan is an approved budget virement of £1 million for Children's services and the additional use of up to £2.5 million of earmarked reserves whilst a more permanent funding solution is sought. Good progress is being made with implementing the plan, particularly to progress the steady and safe reduction of agency workforce, through improved retention and recruitment of a permanent workforce, including international recruits. A new emergency residential assessment service has been opened and is avoiding the costs of additional placements. However, even one additional placement can have massive budgetary implications meaning, despite progress, spend has been contained, rather than reduced.

Alongside this, there continues to be pressures in learning disabilities and older people's services driven by the complexity of need. The Social Services Improvement Board is overseeing a number of actions to address the growth in the adult services budget. These include accelerating the work to transform learning disabilities. An independent review highlighted the need to invest to save to 'right size and right price' care packages to support people to live as independently as possible. Also to support people to retain and regain independence, a target of 80%

of all assessments where long term care and support at home is indicated to go through short term service including enabling and reablement has been set. The pathways between care and support and preventative services to maximise the opportunity for people to have wellbeing outcomes met through community connection and resources in their community. Further actions for 2024-25 are being developed into a 3 year service and financial strategic plan for adult services to be considered by Cabinet in the spring of 2024.

Current projections, as at quarter 3, indicate an over spend of £12.584 million at year end compared with £12.690 million at quarter 2.

The main budget variances are :

<b>SOCIAL SERVICES AND WELLBEING DIRECTORATE</b>	<b>Net Budget</b>	<b>Projected Outturn</b>	<b>Projected Variance Over/(under) budget</b>	<b>% Variance</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	
Adult Social Care	65,934	71,095	5,161	7.8%
Prevention and Wellbeing	7,452	7,290	(162)	-2.2%
Childrens Social Care	25,931	33,515	7,585	29.3%

### **Adult Social Care**

There is projected net over spend of £5.161 million on the Adult Social Care budget. The most significant variances contributing to this projected over spend are:

<b>ADULT SOCIAL CARE</b>	<b>Projected Variance Over/(under) budget</b>
	<b>£'000</b>
Learning Disabilities Home Care	1,993
Homes For Older People	961
Assessment and Care Management	821
Learning Disabilities Residential Care	811
Mental Health Homecare	679
Learning Disabilities Day Opportunities	578
Older People Direct Payments	302
Physical Disability/Sensory Impairment Direct Payments	198
Physical Disability/Sensory Impairment Home Care	101
Equipment & Adaptions	84
Physical Disability/Sensory Impairment Residential/ Nursing	61
Learning Disabilities Direct Payments	(112)
Administration and Central Services	(142)
Mental Health Residential Care	(185)
Mental Health Supported Accommodation	(208)
Older People Home Care	(765)

- Learning Disabilities Home Care – the projected over spend of £1.993 million is comparable with the projected over spend of £1.960 million reported at quarter 2. This is the result of the number of hours of care covered by home care services has increased and there has been an increase in the complexity of people’s needs – e.g. waking nights required rather than sleep-in.
- Homes For Older People – the projected over spend of £961,000 is mainly due to increased Residential/Nursing placement costs (£1.112 million) and has decreased by £136,000 since quarter 2, mainly due to an increase in client contribution income - £129,000.
- Assessment and Care Management – there is a projected over spend of £821,000 due to the need to have agency cover as a result of the recruitment environment and demands in the system particularly linked to supporting the acute hospital and timely discharges.
- Learning Disabilities Residential Care – there is a projected over spend of £811,000 which is primarily due to increased costs for existing placements due to changing needs (£891,000) which is partially offset by under spends on the Breakaway Respite Service (£80,000) due to staff vacancies. The quarter 2 position was a projected over spend of £673,000 with the increase to quarter 3 being primarily due to 1 additional complex new placement.
- Mental Health Home Care – this includes supported living, short breaks and domiciliary care. The projected over spend of £679,000 is mainly due to increased needs of people with supported living packages of care and a net increase of 5 placements since quarter 2 taking the total to 50. This has increased from the projected spend of £315,000 reported at quarter 2.
- Learning Disabilities Day Opportunities – the projected over spend of £578,000 mainly relates to placement numbers exceeding the available budget for external day services. The projected over spend for external day services has increased by £114,000 since quarter 2 due to the transfer of a high cost placement from Children’s Services, plus an increase in support required on two existing placements.
- Older People Direct Payments – there is a projected over spend of £302,000 across the Direct Payments budgets in this area. The main reason for the projected over spend is the increasing complexity of cases resulting in the projected over spend increasing from the £179,000 reported at quarter.
- Physical Disability/Sensory Impairment Direct Payments - there is a projected over spend of £198,000. The projected over spend relates to an increasing complexity of cases that impact on the average cost of direct payments support.
- Physical Disability/Sensory Impairment Home Care - there is a projected over spend of £101,000 which has improved since the quarter 2 projected over spend position of £152,000.
- Equipment & Adaptions – the projected over spend of £84,000 has reduced from the quarter 2 projected over spend £141,000. The over spend position is because of

continuing demand for equipment due to the need to support individuals in line with Welsh Government's rehabilitation and recovery model.

- Physical Disability/Sensory Impairment Residential/Nursing – the projected over spend of £61,000 is due to higher placement numbers than budget. The position has improved from the quarter 2 projected over spend of £80,000 due to an increase in self-funding service user contributions.
- Learning Disabilities Direct Payments – there is projected under spend of £112,000 which has improved from the projected under spend at quarter 2 of £84,000.
- Administration and Central Services – the projected under spend of £142,000 is mainly due to staffing vacancies.
- Mental Health Residential Care – the projected under spend of £185,000 has increased from the quarter 2 projected under spend of £76,000. This is as a result of 3 placements ending in quarter 3.
- Mental Health Supported Accommodation – the projected £208,000 under spend primarily relates to utilisation of Innovation Grant Funding to support staffing budgets in this service area (£262,000).
- Older People Home Care – the projected £765,000 under spend primarily relates to staffing under spends as a result of the recruitment challenges in the home care sector. Agency staff have been utilised to supplement the workforce where available, however the service is still experiencing ongoing recruitment challenges. The service has also sought to maximise the Regional Integrated Fund and Transformation grant funding - £140,000 - which has overall resulted in a projected under spend on staffing of £508,000.

#### **Prevention and Wellbeing**

- The projected under spend of £162,000 is primarily due to the utilisation of grant funding opportunities offsetting salary costs (£122,000 in Prevention and Wellbeing and £25,000 in Playworks).

#### **Children's Social Care**

There is projected net over spend of £7.585 million on the Children's Social Care Budget. This is compared to a quarter 2 projected over spend of £7.614 million. The most significant variances contributing to this projected over spend are:-

<b>CHILDREN'S SOCIAL CARE</b>	<b>Projected Variance Over/(under) Budget – qtr 3 £'000</b>	<b>Projected Variance Over/(under) Budget – qtr 2 £'000</b>
Care Experienced Children	5,329	5,142
Commissioning & Social Work	2,335	2,055
Management & Administration	196	352
Other Child & Family Support Services	(208)	3

- The projected over spend of £5.329 million for Care Experienced Children is due to a combination of factors:-
  - The Independent Residential Care budget has a projected over spend of £5.235 million and has increased by £463,000 from the quarter 2 projected over spend of £4.772 million. The number of care experienced children in out of authority placements remains the same as at quarter 2 - 27. The projected over spend has increased since quarter 2 due to an increase in agency costs as a result of higher staffing ratios for a number of specific high cost placements and an increase in complexity of existing placements. The underlying over spend position is due to a number of factors, including high numbers of care experienced children, insufficient quantum and quality of placements to meet needs including foster carers (in-house and independent) and children requiring specialist provision sometimes with high staffing ratios to keep them safe and protected.
  - Children's Residential Services are projecting an under spend of £346,000, compared with the projected under spend position of £143,000 at quarter 2. This is due to a decrease in costs for agency staff as a result of successfully recruiting permanent members of staff. There is a projected under spend relating to this growth as the posts are being recruited to in 2023-24, along with a delay in the opening of the Golygfa'r Dolydd, a new build children's home.
  - There is a projected under spend on Independent Fostering Agency placements (£344,000). This has decreased since the quarter 2 projected under spend position of £462,000 as the number of placements has increased. The underlying under spend is due to other placement options being utilised including Special Guardianship Orders which are projecting an over spend of £472,000.
- Commissioning and Social Work – the projected over spend of £2.335 million is mainly due to having to rely on agency staffing across all the children's social work teams due to the recruitment challenges and the need to operate above establishment to maintain safe caseloads, although good progress is being made in retaining and recruitment including international recruitment and conversion of some agency workers to permanent contracts.

The service area has however seen an increase in the projected over spend of £90,000 in care support and placement costs, the majority of which relate to Care Experienced Children/care support spend such as court ordered drug testing, assessments, reports, travel and therapy costs.

- Management & Administration – the projected over spend of £196,000 (quarter 2 - £352,000 over spend) relates primarily to staffing costs. There has been a significant increase in children and young people referred for care and support and/or due to safeguarding concerns which require strong and effective management oversight in accordance with inspection findings.
- Other Child & Family Support Services – the projected under spend of £208,000 is primarily due to an anticipated refund from the Regional Adoption service due to their overall budget projecting an under spend and the number of children from Bridgend being adopted continuing to be proportionately lower than budgeted for.



### 3.3.3 Communities Directorate

The net budget for the Directorate for 2023-24 is £34.532 million. Current projections, as at quarter 3, indicate an over spend of £249,000 at year end, an improved position from the projected over spend of £600,000 at quarter 2. The Directorate has undertaken work on increasing fees and charges in-year including charges for green and bulky waste collections, Council operated car parks and burial fees, the impact of which will be reported in the outturn report. Secondly, Corporate Landlord are working on several office rationalisation proposals, including closing both Ravens Court and the Innovation Centre and maximising the use of the Civic Offices, including accommodating partners such as South Wales Police. Other opportunities are also being explored with service areas to ensure the best use of the corporate estate. Finally, maximising grant funding is an ongoing activity as the Directorate has a number of significant grant allocations, including £23 million over 3 years for the Shared Prosperity Fund.

The main variances are:

<b>COMMUNITIES DIRECTORATE</b>	<b>Net Budget</b>	<b>Projected Outturn</b>	<b>Projected Variance Over/(under) budget</b>	<b>% Variance</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	
Development Control	(217)	(150)	67	30.9%
Development Planning	1,139	1,046	(93)	-8.2%
Climate Change Response	571	401	(170)	-29.8%
Waste Disposal & Collection	10,260	10,161	(99)	-1.0%
Fleet Services	135	485	350	259.3%
Highways Services (DSO)	3,347	3,097	(250)	-7.5%
Engineering Services	214	135	(79)	-36.9%
Corporate Landlord	4,435	4,943	508	11.5%

#### Development Control and Planning

- The projected over spend in Development Control of £67,000 is primarily due to the anticipated slippage of significant developments into 2024-25, resulting in a projected downturn in planning application income. At quarter 2, these developments were projected to be submitted in 2023-24, and a projected under spend of £106,000 was reported. Fee income is subject to considerable fluctuations between years, depending on number and of types of applications. For example, in 2021-22 the service experienced a deficit of £249,000, compared with a surplus of £54,000 in 2022-23.
- The projected under spend in Development Planning of £93,000 is due to staff vacancies. Whilst the service has recently gone through a restructure, the service is finding it difficult to recruit to vacant posts.

#### Climate Change Response

- The projected under spend of £170,000 in the Climate Change Response budget is primarily due to staff vacancies (£75,000) and subsequent projected under spend on associated climate change supplies and services budgets (£95,000) as a result of the selective vacancy freeze.

### Waste Disposal and Collection

- There is a net projected under spend on the Waste Disposal and Collection budget of £99,000 which has improved from the projected net over spend of £373,000 reported at quarter 2. The improvement is mainly due to one-off efficiencies during the final year of the waste collection contract. There are still underlying pressures on the waste budget, including:
  - £60,000 due to the delay in the achievement of the 2022-23 MTFS saving, COM 2 - Re-location of Community Recycling Centre from Tythegston to Pyle resulting in cessation of lease payments at the existing site. Positive progress has been made with Natural Resources Wales (NRW) in relation to the licence at the new site in Pyle, however both sites will be maintained until the new site is fully operational, therefore the saving will not be implemented until mid-way through 2024-25.
  - £35,000 due to the delay in the achievement of the 2022-23 MTFS saving, COM 3 – change the composition of Household Food Waste Bags. The budget reduction proposal was delayed until the outcome of national research had been completed to ensure any potential changes in legislation did not impact on this proposal. The new waste contractors from 1st April 2024 have been advised of the change of composition, therefore the saving will be made in full during 2024-25.
  - £50,000 due to the delay in the achievement of the 2023-24 MTFS saving, COM 1 – closure of each of the Community Recycling Centre sites for one weekday per week. Public consultation on this proposal was under taken between 30th June and 12th September 2023, with the outcome reported to Cabinet on 21st November 2023, when the proposal was approved. The current waste contractor is in the process of implementing this saving, and a marginal saving will be made in 2023-24, with the full saving being realised in 2024-25.
  - The remainder of the underlying over spend is due to an increase in subscribers for both the Absorbent Hygiene Products (AHP) (£124,000) and Garden Waste (£53,000) collection services. The AHP service has been promoted to further improve the recycling levels achieved in Bridgend which also mitigates the risk of fines imposed by Welsh Government (WG) if local authorities do not meet their recycling targets. It has seen an increase of 6.2% since the start of the 2022-23 financial year. Garden waste subscriptions have increased by 20% over the last two years with the number of subscribers increasing from 6,249 in 2021-22 to 7,536. An annual subscription fee is charged for the service, and the garden waste collected also improves the recycling levels achieved in Bridgend, however it is not currently a fully cost-recovering service.

### Fleet Services

- There is a projected over spend of £350,000 on Fleet Services which has worsened since the £231,000 projected at quarter 2. The fleet services team operate on a break-even basis with re-charges for work undertaken on directorates, South Wales Police (SWP) and the general public's vehicles, generating income to support staffing and overhead costs. Productivity levels continue to be impacted by long term sickness and ongoing issues with recruitment and retention difficulties. A report outlining options in respect of the operational model and charging mechanisms is in the final stages of development in mitigating the budget position of fleet services.

#### Highways Services

- The projected under spend of £250,000 within Highways Services is primarily due to core funded staff being utilised to support work on capital schemes. In these cases, the salary costs can be capitalised, thus generating one-off income for the service area.

#### Engineering Services

- There is a projected under spend on Engineering Services of £79,000. This is primarily due to an increase in the level of fee earning jobs (grant funded/non grant funded projects) and the differing chargeable rates allowed on the schemes.

#### Corporate Landlord

- There is a projected over spend of £508,000 against Corporate Landlord. As reported in the 2022-23 outturn report, there are shortfalls in income generated from properties run by the Council that relate to occupancy shortfalls which have continued into 2023-24. It was reported at quarter 1 that there was already an underlying shortfall in income at Bridgend Market of £100,000 which had increased to £198,000 at quarter 2 due to the identification of Reinforced Autoclaved Aerated Concrete (RAAC) and the closure of the market. There is also a shortfall in income of £130,000 for the Innovation Centre and £130,000 on Industrial Units, and a strategy is being developed to reduce these income shortfalls in the longer term.
- Corporate Landlord continue to seek to commercially let out wings of Ravens Court to a partner organisation or business. However, at present demand for office space is limited and the re-letting market extremely challenging. As noted in section 3.2.2 and 3.2.5 the £50,000 target for 2022-23 and the £120,000 target for 2023-24 in relation to this MTFs proposal will not be achieved in this financial year which represents a further £170,000 pressure on the Corporate Landlord estates budget.
- The projected over spends have been partially offset by staffing vacancies of £208,000 in line with the selective recruitment freeze.

### **3.3.4 Chief Executive's**

The net budget for the Directorate for 2023-24 is £25.410 million. Current projections anticipate an over spend against this budget of £1.265 million. This is compared to a projected over spend position of £248,000 at quarter 2. The main reason for the increase in projected over spend since quarter 2 is the significant increase in numbers of individuals and households supported to continue the commitment to focus on support for homeless individuals providing them with accommodation. The service area is working on both short and medium term plans to mitigate the increase in temporary accommodation costs.

In the short term the Rapid Rehousing Transitional Plan sets out the intention to work in partnership with key stakeholders to prevent homelessness and to ensure that where prevention is not possible, homelessness is brief and people have access to the support required to live as independently as possible. Secondly, the service is seeking to expand the existing Alternative to Bed & Breakfast Accommodation (ABBA) service which is a partnership working model with Registered Social Landlords (RSLs) to reduce the usage of Bed and Breakfast Accommodation through the provision of suitable temporary accommodation units, with linked housing related support, supporting the move into independent accommodation. Finally, the service is undertaking feasibility work with Corporate

Landlord to develop a procurement strategy whereby the Council purchases, owns and manages shared accommodation.

In the medium term, the service is working with RSLs to utilise capital income streams such as the Social Housing Grant to increase suitable housing stock over a 5 year programme. 2023-24 has seen £3.5 million transitional capital being invested creating an additional 38 units of social housing in the borough. Secondly, Cabinet approved in November 2023 to join the Welsh Government private rent sector Leasing Scheme with the aim of increasing the supply of suitable, affordable accommodation in the borough and reduce demand on homelessness services.

The main variances are:

<b>CHIEF EXECUTIVE'S</b>	<b>Net Budget £'000</b>	<b>Projected outturn £'000</b>	<b>Actual Variance Over/(under) budget £'000</b>	<b>% Variance</b>
Housing & Homelessness	4,177	4,715	538	12.9%
ICT	4,367	4,405	38	0.9%
Legal, Democratic & Regulatory	6,074	6,792	718	11.8%

#### Housing & Homelessness

- There is a projected over spend of £538,000 on Housing & Homelessness. This is compared to the projected under spend position of £522,000 at quarter 2.
- Budget growth of £2.192 million was approved by Council as part of the MTFS Budget setting process in February 2021 to continue the commitment to focus support for homeless individuals providing them with accommodation. An additional budget pressure of £700,000 was approved by Council in March 2022 based on increased numbers of households and individuals supported with accommodation. The core accommodation budget for 2023-24 is £2.722 million.
- For 2023-24, Welsh Government (WG) have confirmed grant funding of £898,694 for accommodation under the "No One Left Out" funding stream, and £137,000 for financial assistance for families and individuals experiencing financial difficulties with accommodation under a Discretionary Homelessness Prevention Grant. The total funding confirmed for 2023-24 of £1.036 million is significantly lower than the total grant allocation of £2.128 million which was received in 2022-23.
- Projected spend on Homelessness accommodation in 2023-24 is £4.790 million, compared with £3.9 million at quarter 2. As well as the core accommodation budget (£2.722 million), total WG accommodation grant funding (£898,694) and Ukrainian grant funding (£72,000) the service has also seen an increase in rental income relating to Housing Benefits claimed by tenants who have been supported with homelessness accommodation (£392,000). The net impact is a projected over spend on homelessness accommodation of £705,000.
- The projected accommodation spend is based on increased numbers of households and individuals supported, from 232 households and 436 individuals in November 2022 to 299 households and 559 individuals in November 2023. The service has seen a significant increase in support

provided since quarter 2 which has contributed to the change to a projected over spend at quarter 3 - in September 2023 there were 276 households and 514 individuals, therefore an increase of 45 individuals and 23 households compared with the November 2023 figures. Secondly, the projected over spend is due to the average length of stay in temporary accommodation increasing from 110 days in November 2022 to 161 days in November 2023. Thirdly, the makeup of households in temporary accommodation involves large households and families with disabilities for whom temporary accommodation is difficult to secure and often results in significantly higher costs. The budget will require close monitoring throughout the remainder of 2023-24 in line with any further changes in support required for homelessness accommodation.

- The projected over spend on accommodation is partially mitigated by the projected under spend of £135,000 on staff vacancies which has increased from the £89,000 under spend projected at quarter 2 in line with the selective vacancy freeze.
- The other area of projected under spend in Housing relates to the Housing Deposits budget, a fund that is used to support initial set-up costs in temporary accommodation which is projecting a £69,000 under spend.

### ICT

- There is a projected net over spend of £38,000 across ICT budgets. This has improved from the projected net over spend of £60,000 reported at quarter 2 due primarily to an increase in the projected under spend on staff vacancy management as a result of the selective vacancy freeze.
- Due to reduced printing activity ICT have been unable to recover the fixed costs of printers and photocopiers through the re-charge to service departments consequently reduced spend has been incurred on printing budgets across the service departments and the ICT service has received less income. An exercise was undertaken in quarter 2 to re-align print budgets and the position in ICT reflects a £125,000 realignment from service area budgets.

### Legal, Democratic & Regulatory

- There is a net over spend of £718,000 across Legal, Democratic and Regulatory services, which shows a slightly improved position from the quarter 2 projected net over spend of £747,000. The projected over spend is primarily due to legal fees continuing to be a budget pressure. The pressures experienced in 2022-23 on public and private law childcare cases, along with an increase in volume of complex cases that have required King's Counsel, are continuing into 2023-24 and the projections are based on the number and complexity of cases.
- In comparison, the over spend on legal fees for 2022-23 was £417,000, but this was offset by an earmarked reserve of £340,000 which was drawn down in full in that financial year.
- There is also a net £99,000 projected over spend in Regulatory Services (Licencing, Public Health, Pest Control etc) due to under recovery of income, particularly in Taxi Licencing and Environmental Health.

### 3.3.5 Council Wide budgets

This section includes budgets, provisions and services which are council wide, and not managed by an individual directorate. The net budget for 2023-24 is £37.276 million. Current projections anticipate an under spend against this budget of £4.950 million. The main variances are:-

<b>COUNCIL WIDE BUDGETS</b>	<b>Net Budget</b>	<b>Projected Outturn</b>	<b>Projected Variance Over/(under) budget</b>	<b>% Variance</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	
Capital Financing	7,142	4,233	(2,909)	-40.73%
Council Tax Reduction Scheme	16,054	15,603	(451)	-2.81%
Other Council Wide Budgets	1,678	197	(1,481)	-88.26%

#### Capital Financing

- The projected under spend of £2.909 million mainly relates to additional interest from current investments due to the higher level of interest rates agreed by the Bank of England Monetary Policy Committee. It was noted in the revenue outturn report that the increase to 4.5% in May 2023 was the highest it has been since 2008, but this has further increased to 5% in June 2023 and 5.25% in August 2023. The rate has remained frozen at 5.25% since August.
- The under spend is predicated on interest rates being sustained throughout the remainder of 2023-24. It should also be noted that this will not be a recurring under spend as the Council approved new Highways and Children's Playground refurbishments in the Capital Programme in March 2023 to be funded from a combination of unallocated capital funding and prudential borrowing and this has not been drawn down in full to date.

#### Council Tax Reduction Scheme

- There is currently a projected under spend of £451,000 on the Council Tax Reduction Scheme. This is a demand led budget and take-up is difficult to predict. The projected take-up for 2023-24 is higher than in 2022-23 when the gross spend in this budget area was £14.885 million, although part of this would be as a result of the council tax increase in April 2023. The budget will be closely monitored going into 2024-25 as there could be an additional call on the scheme in view of the impact of the cost of living crisis on personal financial circumstances with the potential for an increase in the number of benefit claimants.

#### Other Council Wide Budgets

- As referred to in paragraph 3.1.13 there is no further funding available for any further unexpected major price inflation increases and the budget will need to be monitored closely going into 2024-25. However it is anticipated that there will be a reduction in corporate support required to fund potential redundancy costs as, following the better than anticipated WG settlement for 2023-24, fewer budget reduction proposals had to be made.
- In addition, when the 2023-24 budget was approved, a number of recurrent pressures for 2023-24 totalling £9.77 million were agreed with a further £1.3 million being retained centrally to support emerging pressures. At the September meeting of Council, £1 million of this was approved to be allocated to Social Services as part of the 3 year sustainability plan for Children's Services in line with the Financial

Procedure Rules. Cabinet have approved the use of the uncommitted funding of £300,000 for emerging budget pressures to be utilised against the increased cost of the annual waste collection service from 2024-25, therefore contributing to the overall projected under spend for other council wide budgets in 2023-24.

### **3.3.6 Council Tax Collection**

At quarter 2 it was reported that it was still early in the financial year to provide a realistic indication of projected council tax income for 2023-24, and whether the Council was likely to see a reduction in council tax income as more people have suffered financial hardship due to the current cost of living crisis, or whether additional income would be collected from the introduction of council tax premiums on empty properties. Projections at quarter 2 indicated that budgeted council tax income levels would be achieved with the possibility of up to 1% additional income, around £1 million. It is still projected at quarter 3 that up to 1% additional income will be achieved, however, due to changing personal circumstances of individuals, and changes to those receiving council tax support, council tax collection rates will be monitored continuously throughout the remainder of the year and reported accordingly.

## **3.4 Review of Earmarked Reserves**

3.4.1 A thorough review of earmarked reserves was undertaken by Corporate Management Board during quarter 1 of 2023-24, which included an assessment of the draw down profile and re-profiling of existing earmarked reserves.

3.4.2 The review in quarter 1 identified £3.067 million of reserves to be unwound in order to fund emerging risks for the Council as a whole during 2023-24 and a further £733,000 to be repurposed for similar schemes. On 20th September 2023 Council approved the use of £2.5 million of the unwound reserves to support the deliverability of the 3 year sustainability plan, to improve outcomes for Children and Family Services in Bridgend, whilst a more permanent funding solution is sought. The other significant earmarked reserve established was £355,000 towards the demolition costs of Brackla Car Park.

3.4.3 The cumulative draw down by directorates in 2023-24 is £5.799 million as shown in Table 4 below. The majority of draw down from earmarked reserves takes place in the latter stages of the financial year, especially on capital and grant funded schemes. In addition, school balances are not adjusted until the year end – an overall reduction in year of £7.066 million on school balances is currently projected.

**Table 4 – Earmarked Reserves – Quarter 3**

Opening Balance 01 Apr 23	Reserve	Net Additions/ Reclassification	Draw-down	Unwound	Closing Balance 31 Dec 23
£		£	£	£	£
	<b>Corporate Reserves:</b>				
50,531	Capital Programme Contribution	3,014	-	(2,099)	51,446
3,794	Asset Management Reserves	355	(421)	(199)	3,529
2,978	Major Claims, Health & Safety, Insurance Reserves	-	-	(848)	2,130
2,893	Service Reconfiguration	-	-	-	2,893
2,263	Cost of Living Fund	-	(2,263)	-	-
3,423	Change Management/ Digital Transformation	(142)	(196)	(120)	2,965
2,000	Economic and Future Resilience Fund	-	-	(294)	1,706
<b>67,882</b>	<b>Total Corporate Reserves</b>	<b>3,227</b>	<b>(2,881)</b>	<b>(3,560)</b>	<b>64,669</b>
	<b>Directorate Earmarked Reserves:</b>				
693	Education & Family Support	78	(185)	(99)	488
6,076	Social Services & Wellbeing	2,500	(1,831)	(100)	6,646
2,753	Communities	130	(106)	(69)	2,708
3,102	Chief Executives	153	(747)	(486)	2,022
<b>12,624</b>	<b>Total Directorate Reserves</b>	<b>2,862</b>	<b>(2,868)</b>	<b>(754)</b>	<b>11,864</b>
	<b>Equalisation &amp; Grant Earmarked Reserves:</b>				
2,074	Education & Family Support	(78)	(50)	(736)	1,210
436	Social Services & Wellbeing	-	-	(350)	86
2,846	Communities	-	-	(594)	2,252
346	Chief Executives	(153)	-	-	193
<b>5,703</b>	<b>Total Equalisation Reserves</b>	<b>(232)</b>	<b>(50)</b>	<b>(1,680)</b>	<b>3,741</b>
<b>6,898</b>	<b>School Balances</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>6,898</b>
<b>10,109</b>	<b>Council Fund</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>10,109</b>
<b>103,217</b>	<b>Total Reserves</b>	<b>5,857</b>	<b>(5,799)</b>	<b>(5,994)</b>	<b>97,282</b>

3.4.4 The capital programme contribution reserve supplements the funding the Council receives from WG and via capital receipts to fund the approved capital programme. Currently, there is a balance of £51.446 million of funding in this reserve which constitutes 52.9% of our overall earmarked reserves balances. This will be used to fund a wide range of schemes in the capital programme.

3.4.5 The School balances reserve decreased from £14.228 million to £6.898 million at the end of 2022-23. As noted in paragraph 3.3.1, the quarter 2 projections indicate a projected overall deficit balance for school delegated budgets of £167,593 at year end. This will reduce this reserve accordingly by year end.



#### **4. Equality implications (including Socio-economic Duty and Welsh Language)**

4.1 The protected characteristics identified within the Equality Act 2010, Socio-economic Duty and the impact on the use of the Welsh language have been considered in the preparation of this report. As a public body in Wales, the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

#### **5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

5.1 The Act provides the basis for driving a different kind of public service in Wales, with 5 ways of working to guide how public services should work to deliver for people. The well-being objectives are designed to complement each other and are part of an integrated way of working to improve well-being for the people of Bridgend. The allocation of budget determines the extent to which the Council's well-being objectives can be delivered. It is considered that there will be no significant or unacceptable impacts upon the achievement of the well-being goals or objectives as a result of this report.

#### **6. Climate Change Implications**

6.1 There are no direct implications arising from this report.

#### **7. Safeguarding and Corporate Parent Implications**

7.1 There are no direct implications arising from this report.

#### **8. Financial Implications**

8.1 These are reflected in the body of the report.

#### **9. Recommendation**

9.1 Cabinet is recommended to:

- note the projected revenue position for 2023-24

**Background documents:** Individual Directorate Monitoring Reports

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## PRIOR YEAR BUDGET REDUCTIONS CARRIED FORWARD INTO 2023-24

Ref.	Budget Reduction Proposal		Original Reduction and RAG £000	Revised RAG £000	Total amount of saving likely to be achieved by 23-24 £000	Reason why not achievable	Proposed Action in 2023-24 to achieve
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## RAG STATUS KEY

<b>RED</b>	Not likely to be achieved at all in this financial year or less than 25%.
<b>AMBER</b>	Reduction not likely to be achieved in full in financial year but greater than 25%
<b>GREEN</b>	Reduction likely to be achieved in full

## SOCIAL SERVICES &amp; WELLBEING

SSW 2 (2022-23)	Remodelling day service provision for older people and learning disability services		115		115	As reported in the 2022-23 Revenue outturn report, some efficiencies were identified, however external factors prevented the achievement of the full savings target.	A review of the budgets within Adult Services was undertaken during quarter 2 to identify replacement savings against the £30,000 shortfall reported in quarter 1. Budget virements were actioned from Adult Services Non-residential income. No further action required.
<b>Total Social Services &amp; Wellbeing Directorate</b>			<b>115</b>		<b>115</b>		

## COMMUNITIES

COM 2 (2021-22)	Re-location of Community Recycling Centre from Tythegston to Pyle resulting in cessation of lease payments at existing site		60		0	Positive progress has been made with Natural Resources Wales in relation to the licence at the new site in Pyle, however both sites will be maintained until the new site is fully operational, therefore the saving will not be implemented until mid-way through 2024-25.	The service has endeavoured to meet the saving through alternative one off efficiencies in 2023-24 to deliver a balanced budget position.
COM 3 (2022-23)	Change the composition of Household Food Waste Bags		35		0	The budget reduction proposal was delayed until the outcome of national research had been completed to ensure any potential changes in legislation did not impact on this proposal. The new waste contractors from 1st April 2024 have been advised of the change of composition, therefore the saving will be made in full during 2024-25.	The service has endeavoured to meet the saving through alternative one off efficiencies in 2023-24 to deliver a balanced budget position.
COM 4 (2022-23)	Remove Business in Focus from running Enterprise Centres in Bridgend		20		0	Rising costs of utilities, general contractor rates and occupational levels/demand impacting on profitability of Business in Focus units and therefore ability to reduce running costs and deliver saving proposal.	Review of Business in Focus operating model continues to be explored to identify operating efficiencies with a view to restructuring the management agreement with Business in Focus to deliver savings.
COM 5 (2022-23)	Commercially let a wing of Ravens Court to a partner organisation or business		50		0	Demand for office space at this time is limited, the re-letting market extremely challenging and investment is required on the heating and ventilation system in Ravens Court before being able to lease the building.	It is intended to accelerate shared use of space with public sector partners, in particular South Wales Police in the Civic Offices, in 2024-25.
<b>Total Communities Directorate</b>			<b>165</b>		<b>0</b>		

<b>GRAND TOTAL OUTSTANDING REDUCTIONS</b>		<b>280</b>		<b>115</b>			
<b>REDUCTIONS SHORTFALL</b>					<b>165</b>		

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**MONITORING OF 2023-24 BUDGET REDUCTIONS**

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Proposed 2023-24 £'000	Value achieved to date 2023-24 £'000	Value Likely to be Achieved 2023-24 £'000	Reason why not likely to be achievable
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**EDUCATION & FAMILY SUPPORT**

**CENTRAL EDUCATION & FAMILY SUPPORT**

EDFS1	Delegate some school transport responsibilities to The Bridge Pupil Referral Unit under a new delivery model to deliver efficiency savings	<ul style="list-style-type: none"> <li>Minimal impact anticipated</li> <li>Alternative service model to be implemented to deliver the identified efficiency</li> <li>Increased responsibility for school</li> </ul>	40	0	0	Officers continue to investigate the practicalities and implications of a bespoke transport arrangement for the Bridge Alternative Provision. Until the market has been tested and the school agrees to the arrangements, it will not be known if the saving can be made.
<b>Total Education and Family Support</b>			<b>40</b>	<b>0</b>	<b>0</b>	

**SCHOOLS**

SCH1	Efficiency savings against School Delegated Budgets - 2% for 2023-24	<ul style="list-style-type: none"> <li>The annual saving represents a 2% efficiency per annum against individual school budgets</li> <li>Risk of increased school deficit positions</li> <li>Implementation will be a matter for individual schools</li> <li>Potential to result in some teacher and other staff redundancies</li> <li>If efficiency is made solely from staffing budgets, this could range from a minimum of one teacher in our large primary schools and to five teachers in our larger secondary schools being made redundant over the MTFS period</li> </ul>	2,118	2,118	2,118	The savings have been implemented and schools budgets reduced accordingly. However, the overall consequential effect on schools is a significant contributory factor in that projected year end balances have fallen from £6.898 million brought forward from 2022-23 to £167,593 projected deficit for 2023-24. There are 25 schools projecting deficit budget situations, many of which will be unlikely to balance their budget by year end.
<b>Total Schools</b>			<b>2,118</b>	<b>2,118</b>	<b>2,118</b>	
<b>Total Education &amp; Family Support Directorate</b>			<b>2,158</b>	<b>2,118</b>	<b>2,118</b>	

**MONITORING OF 2023-24 BUDGET REDUCTIONS**

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Proposed 2023-24 £'000	Value achieved to date 2023-24 £'000	Value Likely to be Achieved 2023-24 £'000	Reason why not likely to be achievable
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**COMMUNITIES**

COM1	Closure of each of the Community Recycling Centre sites for one weekday per week	The waste contract related items would require both Contract variation negotiations with Kier to confirm the saving levels proposed along with public consultation regarding the reduced levels of service.	50	0	4	Public consultation on this proposal was undertaken between the 30 June and 12 September 2023, with the outcome reported to Cabinet on the 21 November 2023, when the proposal was approved. The current waste contractor is in the process of implementing this saving, and a marginal saving will be made in 2023-24, with the full saving being realised in 2024-25.
COM2	Charging Blue Badge Holders for parking	There are currently a number of measures which assist in providing equitable access, particularly for those who are participants in the Blue Badge Scheme. These include reserved spaces for Blue Badge Holders in Off-Street Car Parks in convenient locations, guidance on the proportion of disabled parking spaces within new parking facilities, some on-street parking provision in town centre locations, the ability to park on double yellow lines for up to 3 hours as long as no obstruction is caused and the Shopmobility scheme operated within Bridgend Town Centre. In providing parking either at ground level or in multi-storey car parks, the Council incurs both capital and ongoing revenue costs which the Council must source from its own funds. The current position is that a concession is applied in Off Street Car Parks for persons displaying a Blue Badge which provides for unlimited parking free of charge.	40	0	0	The traffic management team have been engaged in the introduction of the default national speed limit in built up areas. The saving proposal is unlikely to be achieved this year due to the processes required to introduce any change.
COM3	Commercially let two wings of Ravens court to a partner organisation or business	Savings would be predicated on reduction in utilities from not occupying the space and rental income	120	0	0	Demand for office space at this time is limited, the re-letting market extremely challenging and investment is required on the heating and ventilation system in Ravens Court before being able to lease the building.
COM4	Use revenue savings accrued as a result of switching street lighting to LED's across the County	The savings are predicated from reduced energy bills in 22/23 as a result of the LED street lighting roll out. This may be diminished in future years by rising energy costs overall	100	100	100	Full saving should be achieved in 2023-24

**MONITORING OF 2023-24 BUDGET REDUCTIONS**

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Proposed 2023-24 £'000	Value achieved to date 2023-24 £'000	Value Likely to be Achieved 2023-24 £'000	Reason why not likely to be achievable
COM5	Reduction to Highways - Road Marking Budget	This reduction could have an impact on the enforcement of restriction as the remaining funding will be focused on markings that have wider safety implications	10	10	10	Full saving should be achieved in 2023-24
COM6	Increase garden waste subscription cost to £46 per household and £42 for pensioners (Currently £41.01 per household or £36.73 for pensioners)	Potential increase in fly tipping. Loss of subscribers	30	30	30	Full saving should be achieved in 2023-24
COM7	Increase bulky waste charges from £21.42 for 3 items to £25.	Potential increase in fly tipping.	25	25	25	Full saving should be achieved in 2023-24
<b>Total Communities Directorate</b>			<b>375</b>	<b>165</b>	<b>169</b>	

**CHIEF EXECUTIVES**

CEX1	Reduction of ICT Printing Costs	Due to the increase in working from home across the authority, savings can be found in the ICT Print Strategy area. These savings are in line with the cultural shift towards the paperless office agenda.	40	40	40	Full saving should be achieved in 2023-24
CEX2	Efficiency saving target targeting supplies and services budgets across the Chief Executive's Directorate	Limited impact as review has identified small historic under spends against this budget category	35	35	35	Full saving should be achieved in 2023-24
<b>Total Chief Executive's Directorate</b>			<b>75</b>	<b>75</b>	<b>75</b>	

<b>GRAND TOTAL REDUCTIONS</b>		<b>2,608</b>	<b>2,358</b>	<b>2,362</b>
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<b>REDUCTION SHORTFALL</b>				<b>246</b>
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230	2,358	2,358
260	0	0
2,118	250	250
2,608	2,608	2,608

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BRIDGEND COUNTY BOROUGH COUNCIL	Budget 2023-24			Projected Outturn	Projected Variance Over/(under) budget	% Variance
	Expenditure Budget	Income Budget	Net Budget			
	£'000	£'000	£'000			
<b>EDUCATION AND FAMILY SUPPORT</b>						
School Delegated Budgets	137,317	(21,302)	116,015	116,015	-	0.0%
Learner Support	8,151	(1,216)	6,935	7,663	728	10.5%
Family Support	7,991	(4,389)	3,602	3,273	(329)	-9.1%
Business Support	16,508	(4,418)	12,090	12,845	755	6.2%
Schools Support	1,540	(837)	703	666	(37)	-5.3%
School Modernisation	3,889	-	3,889	3,952	63	1.6%
Vulnerable Groups Support	882	(96)	786	681	(105)	-13.4%
Other Education and Family Support	1,840	(60)	1,780	1,844	64	3.6%
<b>TOTAL EDUCATION AND FAMILY SUPPORT</b>	<b>178,118</b>	<b>(32,318)</b>	<b>145,800</b>	<b>146,939</b>	<b>1,139</b>	<b>0.8%</b>
<b>SOCIAL SERVICES AND WELLBEING</b>						
Adult Social Care	88,782	(22,848)	65,934	71,095	5,161	7.8%
Prevention and Wellbeing	8,432	(980)	7,452	7,290	(162)	-2.2%
Childrens Social Care	27,061	(1,131)	25,930	33,515	7,585	29.3%
<b>TOTAL SOCIAL SERVICES AND WELLBEING</b>	<b>124,275</b>	<b>(24,959)</b>	<b>99,316</b>	<b>111,900</b>	<b>12,584</b>	<b>12.7%</b>
<b>COMMUNITIES DIRECTORATE</b>						
Planning & Development Services	2,763	(2,023)	740	715	(25)	-3.4%
Strategic Regeneration	3,009	(1,280)	1,729	1,729	-	0.0%
Economy, Natural Resources and Sustainability	7,066	(5,390)	1,676	1,507	(169)	-10.1%
Cleaner Streets and Waste Management	14,505	(1,968)	12,537	12,526	(11)	-0.1%
Highways and Green Spaces	25,535	(12,410)	13,125	13,071	(54)	-0.4%
Director and Head of Operations - Communities	290	-	290	290	-	0.0%
Corporate Landlord	16,483	(12,048)	4,435	4,943	508	11.5%
<b>TOTAL COMMUNITIES</b>	<b>69,651</b>	<b>(35,119)</b>	<b>34,532</b>	<b>34,781</b>	<b>249</b>	<b>0.7%</b>
<b>CHIEF EXECUTIVE'S</b>						
Chief Executive Unit	517	-	517	525	8	1.5%
Finance	39,431	(35,194)	4,237	4,290	53	1.3%
HR/OD	2,635	(398)	2,237	2,182	(55)	-2.5%
Partnerships	3,604	(1,227)	2,377	2,312	(65)	-2.7%
Legal, Democratic & Regulatory	7,043	(969)	6,074	6,792	718	11.8%
Elections	186	-	186	171	(15)	-8.1%
ICT	5,501	(1,134)	4,367	4,405	38	0.9%
Housing & Homelessness	12,036	(7,859)	4,177	4,715	538	12.9%
Business Support	1,349	(111)	1,238	1,283	45	3.6%
<b>TOTAL CHIEF EXECUTIVE'S</b>	<b>72,302</b>	<b>(46,892)</b>	<b>25,410</b>	<b>26,675</b>	<b>1,265</b>	<b>5.0%</b>
<b>TOTAL DIRECTORATE BUDGETS</b>	<b>444,346</b>	<b>(139,288)</b>	<b>305,058</b>	<b>320,295</b>	<b>15,237</b>	<b>5.0%</b>
Council Wide Budgets	38,250	(974)	37,276	32,326	(4,950)	-13.3%
<b>NET BRIDGEND CBC</b>	<b>482,596</b>	<b>(140,262)</b>	<b>342,334</b>	<b>352,621</b>	<b>10,287</b>	<b>3.0%</b>

NB: Differences due to rounding of £000's

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# Agenda Item 5

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>16 JANUARY 2024</b>
<b>Report Title:</b>	<b>MEDIUM TERM FINANCIAL STRATEGY 2024-25 TO 2027-28</b>
<b>Report Owner / Corporate Director:</b>	<b>CHIEF OFFICER – FINANCE, PERFORMANCE AND CHANGE</b>
<b>Responsible Officer:</b>	<b>DEBORAH EXTON DEPUTY HEAD OF FINANCE</b>
<b>Policy Framework and Procedure Rules:</b>	The budget setting process is outlined within the Council's Constitution and Financial Procedure Rules.
<b>Executive Summary:</b>	<ul style="list-style-type: none"> <li>• The draft Medium Term Financial Strategy (MTFS) sets out the spending priorities for the Council for the next 4 years alongside a detailed budget for 2024-25.</li> <li>• The report outlines the financial, legislative and policy context within which the draft budget has been prepared alongside more detailed information on the services to be provided by the Council over the period of the MTFS.</li> <li>• The proposed MTFS is driven by the Council's 13 MTFS principles, and has been developed by Cabinet and Corporate Management Board, taking into account discussions with the Budget Research and Evaluation Panel.</li> <li>• Welsh Government announced its draft budget on 19 December 2023 before the announcement of the provisional local government settlement on 20 December 2023.</li> <li>• In terms of the provisional local government settlement, the all-Wales increase in Aggregate External Funding (AEF) was 3.1%. The increase for Bridgend was 3%.</li> <li>• No information was provided on future years' funding although indications are it will still be extremely challenging.</li> <li>• There were no transfers for new responsibilities or specific grants into the settlement.</li> <li>• The proposed budget for 2024-25 is £359.725 million, and this includes pay and price pressures of £21.5 million,</li> </ul>

	<p><b>service budget pressures of £11.856 million (Appendix A), budget reductions of £16.039 million (Appendix B) and a council tax increase of 9.5%. The breakdown of the budget for 2024-25 is set out in Table 5.</b></p> <ul style="list-style-type: none"> <li>• <b>The MTFS sets out a most likely savings target of £34.376 million over the next 4 financial years.</b></li> <li>• <b>The Council’s general capital funding decreased by £43,000 to £7.965 million.</b></li> <li>• <b>The Section 151 officer has a statutory duty to set a balanced and robust budget.</b></li> <li>• <b>If approved by Cabinet the draft MTFS will be submitted for consultation with the Council’s Overview and Scrutiny Committees before a final version is presented to Council for approval on 28 February 2024.</b></li> </ul>
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## **1. Purpose of Report**

1.1 The purpose of this report is to present Cabinet with the draft Medium Term Financial Strategy 2024-25 to 2027-28, which sets out the spending priorities of the Council, key investment objectives and budget areas targeted for necessary savings. The strategy includes a financial forecast for 2024-2028 and a detailed draft revenue budget for 2024-25.

## **2. Background**

### **Corporate Plan - Policy Context**

2.1 The Council’s well-being objectives under the Well-being of Future Generations (Wales) Act 2015 are currently:

- A County Borough where we protect our most vulnerable
- A County Borough with fair work, skilled, high-quality jobs and thriving towns
- A County Borough with thriving valleys communities
- A County Borough where we help people meet their potential
- A County Borough that is responding to the climate and nature emergency
- A County Borough where people feel valued, heard and part of their community
- A County Borough where we support people to live healthy and happy lives

2.2 This draft MTFS has been significantly guided by these objectives. Although previous year-on-year changes in Aggregate External Finance (AEF) have necessitated substantial budget reductions across different service areas (£75.3 million since austerity began in 2010 - of which schools have contributed £4.8 million), the Council still plays a very prominent role in the local economy of Bridgend County Borough and is responsible for annual gross expenditure of around £500 million and is the largest employer in the county borough. The Corporate Plan will be presented to Council for approval alongside the MTFS 2024-2028 on 28 February 2024 and will be fully aligned with the MTFS including explicit links between resources and well-

being objectives. However, it is clear that the challenging financial situation that the Council faces and the level of budget and service cuts that need to be made will inevitably severely impact on and restrict some of the objectives set out in the Corporate Plan for at least 2024-25, but maybe also beyond that, but the Council will remain ambitious in providing the maximum levels of service possible for all residents of the County Borough.

- 2.3 The Welsh Government announced its Final Local Government Settlement for 2023-24 on 28 February 2023. The increase in Aggregate External Finance (AEF) across Wales was 7.9%, with Bridgend receiving an increase of 7.7%. This increase, whilst intended to cover a number of new pressures, including the ongoing pressures from the pandemic, was considered to be better than anticipated. However, this was before the ongoing cost of living crisis, higher than anticipated pay increases and price inflation, and unprecedented demand from some of the more vulnerable members of the community.
- 2.4 The quarterly reports to Cabinet on the revenue position for 2023-24 have outlined in detail the increased difficulty in managing and monitoring the budget, in view of challenging and rapidly worsening 'in-year' pressures which include additional inflationary pressures arising as a result of the ongoing conflict in Ukraine, and the impact of the cost of living crisis on both pay and prices, particularly fuel and energy prices, in addition to increasing demand in some service areas. Whilst some provisions were made in the 2023-24 budget, and during the financial year, to mitigate some of these costs, there was not sufficient funding to meet all, and the demand has been relentless. There has been particular pressure on children's services, leading to the approval of a 3 year sustainability plan by Council on 20 September 2023, along with additional financial support. However, further investment is needed going forward to stabilise this and other services.
- 2.5 Budget planning for the financial year 2024-25 is therefore even more uncertain and challenging than usual, with even more cost pressures presenting themselves going forward than has been experienced in previous years. In addition, there are higher expectations on the Council to address homelessness more robustly, and on a longer term sustainable basis, and additionally to strengthen and support social care, which is experiencing increased demand and costs as well as more complex cases in both adult and children's services. The Council is having to reduce spend and services in a climate that requires more support for our older and more vulnerable members of society with substantial increased demand for many services.

### **3. Current situation / proposal**

#### **3.1 Budget Narrative**

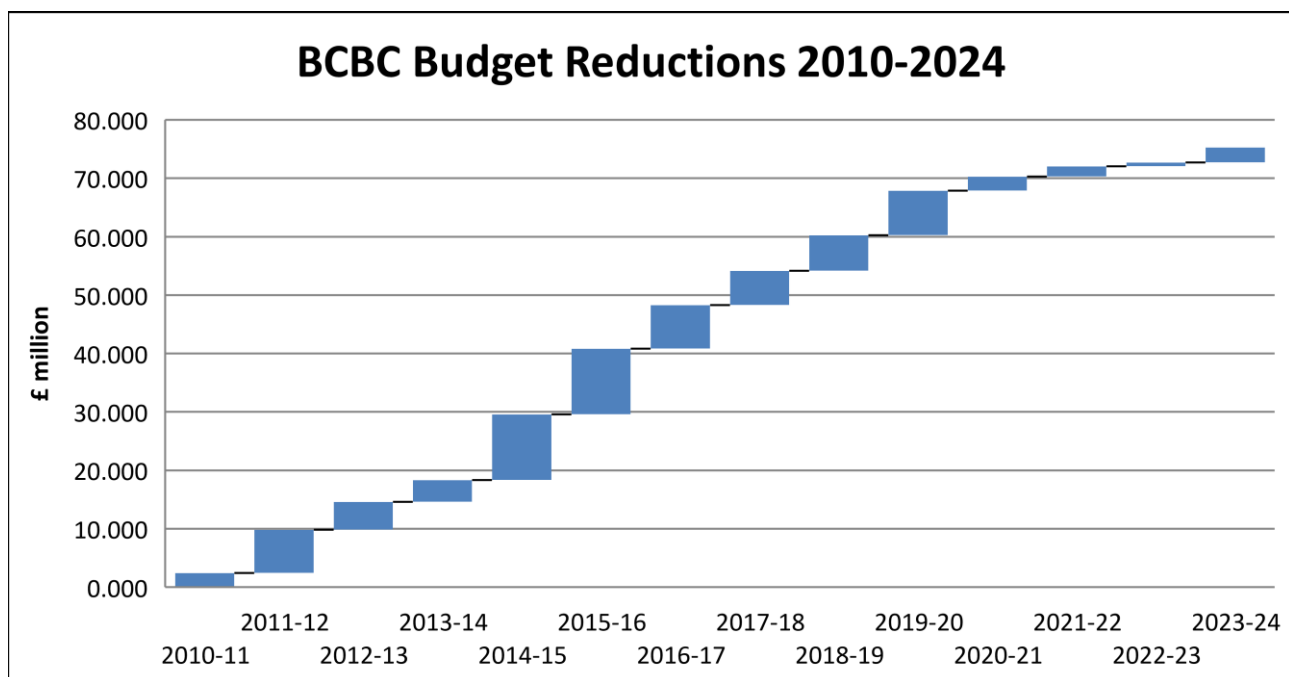
- 3.1.1 Through the MTFs the Council aspires to improve understanding of its financial strategy, to clarify the link between its corporate well-being objectives and the financial planning processes, and to explain the Council's goal of delivering sustainable services in line with the overarching ambition of the Well-being of Future Generations (Wales) Act 2015. The following budget narrative aims to articulate the continued and significant investment in public services that the Council will make. It sets out how the Council aims to change particular areas of service delivery, and the financial consequences of this. Cabinet has requested that the following principles should underpin the development of the budget for the coming financial year:

- The Council will seek to safeguard and protect the most vulnerable people in our communities;
- The Council will encourage residents and communities to support themselves and provide advice to enable this to happen;
- The Council will seek to limit service growth in the coming financial year;
- All Directorates will be required to contribute to the overall savings required in the coming years;
- The Council must have an efficient “back office” service that supports service delivery and transformation;
- In setting the budget, the Council will be mindful of the predicted financial austerity across the public sector in the coming years and plan to ensure the financial viability of the Council, and;
- The Council will seek to recover the cost of services via fees and charges where it is able to do so.

### 3.1.2 Corporate Financial Overview

Since austerity began in 2010 the Council has made almost £75.3 million of budget reductions, as shown below, towards which school delegated budgets have contributed £4.8 million. These reductions represent almost 21% of the Council's current net budget, however the percentage of savings and cuts has not been equal across all Council services, with relative protection given in past years to some areas, such as schools' budgets and social services, for example.

#### **Bridgend County Borough Council (BCBC) Budget Reductions 2010 to 2024**



While the Council's net revenue budget is planned at £359.725 million for 2024-25, its overall expenditure far exceeds this. Taking into account expenditure and services which are funded by specific grants or fees and charges, the Council's gross budget will be around £500 million in 2024-25. The local authority's annual revenue budget covers the day-to-day running costs of the local authority (including

staff salaries, building maintenance, pensions, operational costs etc.). Around £210 million of the gross budget is spent on the Council's own staff including teachers and school support staff. Much of the cost of the services provided by external organisations is also wage related – these include for example waste collection operatives, social care workers, leisure staff and foster carers.

The Council gets the majority of its revenue funding (51%) from Welsh Government through the Revenue Support Grant and a share of non-domestic rates. Non-domestic rates are a charge on business properties, the rate for which is set by Welsh Government. It supplements this through council tax collection (19%), other grants (20%) and fees and charges (10%). Council tax is a charge that local authorities charge to help to pay for their services. The amount that council tax payers pay is made up of 3 elements:

- Bridgend County Borough Council charge
- Town or Community Council charge
- Police and Crime Commissioner for South Wales charge

In terms of council tax, the proportion of council tax required to balance the Council's budget has steadily increased over recent years and it currently funds around 27% of the net revenue budget. This means that for every £1 spent on services provided by the Council, only around 27 pence is funded by local council tax payers.

As well as having reduced real income to fund services, there are other pressures that squeeze resources. Amongst these are:

- Legislative changes e.g. the Welsh Government's commitment to eradicate homelessness, local authorities' responsibilities in respect of responding to climate change and meeting net zero carbon targets, the implications of the Local Government and Elections (Wales) Act 2021, the Additional Learning Needs and Education Tribunal (Wales) Act 2018 and legislative changes in social care including new adult protection safeguarding requirements, changes to the Public Law Outline for children and the commitment to eliminate private profit from the care of children looked after. Many new legislative changes are not fully funded by Welsh Government, and for some the Council does not have the capacity to deliver them in a timely and efficient manner.
- An increase in need in children's social care – an ongoing exponential increase in contacts, assessments, historically high levels of child protection registration, high level of children being helped on a care and support basis and also high numbers of care experienced children. The last year has seen significant challenges around sufficiency of accommodation, care and support for care experienced children, an issue which all local authorities in Wales are facing. There has been an increase over the year in high cost independent residential placements and 'operating without registration' placements for children and young people. First and foremost this is a safeguarding issue, but in meeting the Council's corporate parenting obligations the budgetary position has significantly worsened as the number of high cost placements exceeds budget. The second area of pressure in children's social care is around workforce. To safeguard children from abuse and harm social workers need to have caseloads which enable meaningful work with children and families.

Following a detailed examination of evidence and best practice, Cabinet and Council approved a 3 year sustainability plan to rebalance children's social care which detailed service changes and financial requirements. The delivery of this plan is key to regulatory confidence in the ability of the Council to improve outcomes for children and families. There continues to be close monitoring of improvements in support for children and families following the 'serious concerns' expressed by Care Inspectorate Wales in 2022.

- Demographic changes – the population is increasing and also people are living longer which is obviously good news. However, this means the number of people living in Bridgend with health and social care needs is also increasing. An ageing population can bring a range of health and social care needs which require care and support. The Cwm Taf Morgannwg Population Needs Assessment (2022-27) identified poorer physical and mental health and wellbeing and greater need for support from all parts of the population with many people living with multiple health conditions and in complex health situations. The cost of living crisis also places more pressure on families and informal care arrangements. Needs have been exacerbated by the pandemic as there have been delays in access to NHS treatment and an impact on physical and mental health from extended lockdown periods. At a time when there has been an increase in contacts within adult social care and increased complexity of issues, there has been less financial support from Welsh Government through targeted grants to address whole system pressures around the interface between hospital and community. In addition the complexities and challenges for children and families are very evident.
- An increase in free school meals entitlement, separate from and additional to the Welsh Government's Universal Free School Meal entitlement, which brings additional funding pressures, as this increases the amount of funding that is needed to be provided to schools through their delegated budgets.
- More recently, a reduction in the council tax collection rate, due to the difficult economic circumstances that people find themselves in. This is coupled with a potential increase in council tax support as more people find themselves on low incomes or claiming benefits during the cost of living crisis.

The Council's Corporate Plan sets out the approaches that it will take to manage these pressures whilst continuing to ensure that, as far as possible, services can be provided that meet the needs of the citizens and communities in Bridgend. These approaches are:

- Though a large and complex organisation, the Council will make every effort to work as one single organisation. That means avoiding duplication and double handling of data through sharing of systems and processes. This is not always as easy as it sounds because often different rules or opportunities apply to different services. Nevertheless, acting as 'One Council working together to improve lives' is enshrined in the Council's vision.
- The Council will support communities and people to become more resilient by creating their own solutions and reducing dependency on the Council. This is because it is not sustainable for the Council to continue to aspire to meet all and every need that arises and because there is capacity, talent and ideas within



the community that can be encouraged to play an active and effective role in sustaining and often enhancing local services. The Council has a role in encouraging, enabling and leading this approach and has adopted this as one of its underlying principles.

- The Council has agreed a principle of focusing diminishing resources on communities and individuals with the greatest need. Parts of our community have long standing problems of poverty and disadvantage. The solutions to this are not all in the direct control of the Council (for example the effects of changes to the welfare system) but where possible the Council has agreed that it wants to both alleviate problems in these areas and develop longer term sustainable solutions. The socio-economic duty on public bodies, which came into force on 31 March 2021, reflects these aims.
- The Council currently has seven well-being objectives that reflect these and other principles. After more than a decade of austerity, with more and more of our residents struggling, we will also continue to improve efficiency and make better use of the resources we have. This means we will ensure that all resources (financial, physical, ecological, human and technological) are used as effectively and efficiently as possible and support the creation of resources throughout the community that can help to deliver the Council's well-being objectives. The effective and efficient use of resources will continue to inform our principles and ways of working in the new Corporate Plan, as well as being tested through the corporate self-assessment process.

In seeking to continue to meet the Council's identified priorities and protect its investment in Education and early intervention, Social Services and Wellbeing, and prioritise the most vulnerable in our society, as far as possible, we are proposing the following changes in the 2024-25 budget.

### **Additional Income**

Whilst recognising the ongoing economic challenges that local people and businesses will face next year, the Council will seek to raise additional income. For all services, the Council has a policy to recover service costs and will seek to do this where possible from April 2024.

### **Alternative Delivery Models**

We will continue to seek alternative ways of delivering services if that can ensure greater sustainability and efficiency. Over recent years there has been a considerable acceleration in the Community Asset Transfer (CAT) Programme, which is releasing savings by transferring responsibility for the management of assets, predominantly outdoor sports related playing fields and pavilions, to town and community councils or community clubs and groups. In addition, the Council's response to the Covid-19 pandemic evidenced how Council services can be delivered differently and it is important that, where appropriate, this is something that endures, and that investment is made to ensure that services can be maintained and delivered safely. Specifically, it is anticipated that an acceleration of the Council's digital programme may allow staff efficiency savings. Wherever possible, staff restructuring will be done sympathetically allowing those that wish to leave to do so, but also continuing to support home and agile working and digital technology to ensure the Council is fit for the future.

## **Efficiency Savings**

The best kind of budget savings, of course, remain ones where there is little or no direct impact on staff or residents. After more than a decade of substantial budget savings, opportunities for large scale savings of this sort are now very scarce, but where they emerge, they remain an important component of the MTFS.

The Covid-19 pandemic reinforced the need for the Council to consider very closely the need for all of its portfolio of building assets. Over recent years savings have been made by rationalising the number of operational depots and releasing two of the Council's major staff offices at Sunnyside and Sunnyside House. For next year, additional savings are proposed from a further review and rationalisation of office accommodation following the implementation of the new service delivery model for office based staff. Specifically, it is intended to accelerate shared use of space with public sector partners, in particular South Wales Police, and to close under-used buildings such as Ravens Court and the Innovation Centre to release savings from associated running costs. The ongoing investment in installing energy efficiency measures in the Council's buildings, including schools, will also continue to offer savings. The Council will continue to seek to apply for and secure grants where they can lead to revenue savings and greater sustainability of important services. Other potential savings are being considered in relation to the remodelling of social services provision.

## **Changes to Service Provision**

Unfortunately, despite the settlement we will receive for 2024-25 being an increase overall, it is still less than inflation, and due to the number of unavoidable pressures we are facing it is highly unlikely that we will be able to balance the budget without also making consequential changes to the level of services that we can provide and prioritising those services that are deemed most important in terms of meeting the Council's agreed priorities. In particular it is important that where the Council runs a service that also benefits other organisations and partners that appropriate contributions are made, where possible, to complement the Council's investment.

### **3.1.3 Education**

The Council is proposing to spend £140 million on services delivered by the Education and Family Support Directorate in 2024-25, prior to the allocation of additional funding for pay and price increases. The majority of this money will be spent directly by Bridgend's 59 schools and one pupil referral unit.

In addition to the £111 million proposed budget to be initially delegated to schools in 2024-25, which mostly pays for the salaries of teaching and other school staff and the running costs of the facilities (ongoing revenue expenditure), the Council has already spent £21.6 million in building and refurbishing schools as part of our 21<sup>st</sup> Century School Modernisation Band A Programme and has provisionally committed to a further £19 million as part of the newly renamed Sustainable Communities for Learning Programme. This comprises one-off capital expenditure across several years, with substantial match funding from Welsh Government. Welsh Government has provided approval in principle in respect of the strategic outline programme,

strategic outline cases, and outline business cases (that is, in respect of capital schemes) submitted by the Council around our aspirations for Band B funding. Full business case approval will be required for all schemes, and Welsh Government approval will be sought once tender prices have been received. However, we are aware that there are significant cost pressures on this programme due to the impact of high inflation on tender prices being submitted and how this is affecting current costings for this programme.

The concepts proposed are based around forecast demand for primary school places, our support to promote the growth in Welsh-medium education and our desire to create additional capacity to meet the needs of children with additional learning needs in Heronsbridge School. It is likely that this will represent the biggest area of capital expenditure for the Council in future years.

The Council has a longer-term goal to make the overall schools' system more efficient (for example, through making sure we have the right number of school places available in the right parts of the county (including ensuring enough capacity for anticipated future increases in school age population)).

For 2024-2025, whilst schools have been tasked with finding budget reductions totalling 5% of their budget, where possible from efficiency savings, in order to help balance the Council's budget, they will receive additional funding for a range of pay and price increases that should more than outweigh this budget reduction. School budgets make up one-third of the Council's overall net budget, so it is impossible to find the level of budget reductions that the Council has to meet without impacting on schools. For example, the current net budget for schools is £114.740 million, compared to an overall net budget of £342.334 million. If schools were not required to make a 5% budget reduction then this would fall on other services, increasing their percentage of budget cuts from 5% to 7.5%.

The forecast pressure on Council budgets for future years is such that further efficiency savings of 1% per annum may be unavoidable for schools for 2025-2026 onwards, and so it will be necessary for headteachers and governing bodies to plan ahead.

The Council's well-being objectives continue to prioritise supporting vulnerable people and helping them to be more self-sufficient. Early intervention is an important part of this – taking steps wherever possible to prevent people becoming reliant on Council services. As well as being of great social value to individuals and communities, this approach is more cost effective in the longer term. Successful intervention at an early age and at an early stage can prevent needs from escalating and requiring more costly and complex help later on.

In seeking to protect our investment in education and early intervention, and to provide as much support as possible to pupils following the disruption caused by the pandemic, the Council is making minimal changes to the services delivered at this time. However, we will continue to seek efficiencies in the application of the Council's Home-to-School/College Transport Policy.

### 3.1.4 Social Care and Well-being

After Education, the largest area of Council spend is on social care. This includes social work and social care for children and for adults with care and support needs. Within the Directorate there is a focus on strengthening practice, improving the 'whole system,' targeted preventative services and supporting our workforce. For many years it has been understood that working in this way can result in less dependency on commissioned social care services for many individuals and more effective and cost-effective use of statutory services. Also, it has been evidenced in budget monitoring and outturn reports that social services' financial performance has been highly dependent on short term grant funding which is offsetting deficits in core budgets to meet the needs of the vulnerable population. Whilst the Directorate continues to develop new approaches to service delivery, and this includes better support and outcomes through prevention, early intervention and well-being services, this is more challenging than ever before with increasing need. The population of Bridgend is growing quickly, the third fastest growth of any Welsh Local Authority, and this means the number of people with care and support needs is also increasing. In addition, there is considerable challenge on the 'supply side' of social care in respect of both workforce (employed by the Council and providers with an increasing reliance on more agency workers) and social care provision, particularly children's residential, with some providers making business decisions to close particular provisions, and adult care and support at home. The Council has undertaken a detailed analysis to understand the fair cost of care which has informed a care home fee setting strategy. This is important in stabilising the care market and providing more certainty to the Council's financial planning.

The Council approved a 3 year sustainability plan for children and families on 20 September 2023. Contacts to children's social care have continued to increase exponentially which analysis shows is to be expected for some years when high profile child deaths occur. It is critical that the 3 year sustainability plan is resourced and delivered in order to rebalance how families are supported over that period. Implementation of the plan is overseen by a Social Services Improvement Board (SSIB) chaired by the Leader of the Council, and which includes the Deputy Leader, Group Leaders, Cabinet Member for Resources and the Chair of the Corporate Overview and Scrutiny Committee, and which is advised by an independent expert in social services. In June 2023 there was a Joint Inspection of Child Protection Arrangements in Bridgend, led by Care Inspectorate Wales (CIW) who welcomed the development of the 3 year sustainability plan. The joint inspectorates acknowledged the resource impact on partners of the level of safeguarding activity. CIW continue to monitor progress with improvements closely and are clear in their analysis of the need for continued corporate support for children's social care. Meeting statutory duties requires significant investment of resources in the workforce and service provision which was endorsed by Council in their approval of the 3 year sustainability plan.

A further area of pressure is the volume and complexity of need for statutory social care services from the vulnerable population of the county borough. Practice continues to be strength based and eligibility criteria rigorously applied in adult services, but the whole systems pressures are clearly evident with delays in people having their needs for care and support met. As with children's social care, there is a need for a sustainable service and financial plan which is being developed for consideration by Cabinet. This plan will have to be cognisant of the service and

financial pressures within the service. Pressures are particularly evident in learning disability services, mental health services and services for older people. An opportunity assessment of learning disabilities has identified areas where practice and commissioning in a strength based, outcome focused, way will also mitigate budget overspends. A learning disability transformation plan has been developed and actions are being progressed through a programme to right-size and right-price care packages and transform day time occupation. Work is also progressing to reset reablement and significantly reduce the number of people who progress to a long term package of care and support at home without having the opportunity to maximise their independence and for the care package to be right-sized, prior to commencing a long term service.

The supply side costs for commissioned care providers (domiciliary, residential and nursing) linked to inflation (food and fuel are particularly impactful), the need to increase the pay of staff to compete with retail and hospitality, and the increased reliance on agency staff (particularly registrant nurses), have meant that some councils have reported having to look at applying across the board increases in their fees during the past year. Across the UK a small number of providers are facing financial difficulties and there is market exit probability in both adult and children's services which will place more pressure on Council budgets as the Council will always be a safety net provider in such circumstances.

The strategy for the next few years is to embed strength-based practice and support individuals and families to live their best lives, remodelling the way we work in order to deliver outcome focused services and approaches which enable people to maximise their independence and families to stay together with targeted support where needed, whilst progressing commissioning strategies and workforce plans which ensure the right person provides the right intervention and support in the most timely and preventative way. The Signs of Safety model of practice in children's social care, and strength based, outcome focused practice in adult social care, provide the basis for 'doing the right thing' which is invariably the most cost effective course of action. The increases in need and complexity from both children and vulnerable adults needs to be understood and reflected in service transformation and aligned financial planning expressed through sustainability plans.

### **3.1.5 Housing and Homelessness**

Housing as a determinant of physical and mental health is widely recognised and this link is reinforced by the range of activities and services provided by the Housing Team. The Housing (Wales) Act 2014 introduced the need to move to a more preventative approach to homelessness and this is a core principle of the work undertaken. The service has responded to the challenges of Covid-19 and new guidance introduced by Welsh Government in relation to homelessness presentations and has already recognised these as budget pressures for the Council, with the aim of providing temporary accommodation to people in need, in order to reduce the number of street homeless people. The Council does not have any housing stock of its own but retains a number of statutory functions relating to addressing housing need and combatting homelessness.

The service also administers the Housing Support Grant from Welsh Government (£7.8 million). The support activities funded via this grant are both broad and diverse. This is done through a range of corporate joint working and contract

arrangements with third sector organisations, delivering specific projects for people who are vulnerable with complex needs. These projects include services for people suffering domestic abuse, mental health and substance misuse issues, learning disabilities, accommodation for young people, people with mental health support needs and other housing related support for people who need help to access or maintain accommodation successfully.

Housing will continue to adopt a strategic approach to homelessness prevention and provision by working with Welsh Government and partner organisations. Work with Registered Social Landlords is on-going to support new housing developments and housing will continue to use the Social Housing Grant effectively to increase the supply of social housing.

### 3.1.6 **Public Realm**

Most of the Council's net budget is spent on education and social care – these are very valued services but are naturally aimed at certain groups within our community. However, the Council's work on the public realm has a direct and visible impact on everybody. This includes our work to maintain highways, parks and open spaces, clean our streets, and collect and dispose of our waste.

In 2024-25 the Council is likely to receive around £4 million of direct Welsh Government grant for public realm services. This includes waste services, public transport, rights of way and road safety.

The overall net budget that the Council proposes to spend on public realm services is around £26 million. The fact that schools have had a high degree of financial protection in previous years has meant that the Council's other services have been under considerable pressure to make savings and, in many cases, we have had to reduce levels of service. However the services in the Communities Directorate have also been subject to service changes that have resulted in alternative delivery models that have increased productivity, as well as collaborative approaches that have increased both efficiency and service resilience. Investment in this area is proposed to continue into 2024-25.

The seven year waste collection contract with Kier will cease in March 2024 and a new interim contract for a period of two years has been procured. This will use the existing fleet and collection methodology. The Council will then need to determine its future waste services model from 2026 onwards. Bridgend is consistently in the top 2 or 3 of best performing waste authorities in Wales in respect of recycling, and therefore has seen a significant reduction in the volume of our residual waste, which is expected to benefit the Council financially over time, subject to contractual conditions with our disposal arrangements. However, the Council has seen higher overall domestic waste due to the impact of the high number of people continuing to work from home. New operating arrangements at a lower cost were negotiated at the Materials Recovery and Energy Centre (MREC) in 2019-20 and an agreement with Neath Port Talbot County Borough Council has been made for waste disposal going forward until 2030 or until a regional facility comes online. We expect to spend in the region of £11 million on the collection and disposal of waste in 2024-25.

A major challenge for the Council is how to continue to meet public expectations for many highly visible and tangible services when a reduction in the available overall

Council budget inevitably means the Council will be less able to deliver these services to the same level and frequency. These services are often the ones the public identify with their council tax payments. Increasingly the Council will seek to enable and facilitate partnerships to help to deliver some services, including more meaningful engagement with local residents regarding the role they can play in working effectively with us.

The Council's strategy is to retain and maintain the most important public services in this area whilst driving ever greater efficiency, making some service reductions where we think it will have the least impact across Council services, recognising that this still may be considerable in some areas. We will also develop alternative ways of delivering and sustaining services including greater and more effective collaboration and encouraging others to work with us or assume direct responsibility for services in some cases. The most significant proposed change in this respect is the move of responsibility for the management and maintenance of sports fields and pavilions from the Council to user clubs and groups or local town and community councils. The Council has adopted a flexible approach to community asset transfer (CAT), utilising a streamlined CAT process, and ensuring that appropriate advice and both capital investment (from the CAT fund in the capital programme) and revenue support (from the sports club support fund) are made available. The Council is well on its way to achieving savings of £300,000 between 2021-22 and 2024-25 from transferring these assets.

Reductions in spend in this area will allow us to protect our investment in the Council's priorities and in areas where we have far less ability to exercise control.

### **3.1.7 Supporting the Economy**

Whilst this is a Council priority, services such as regeneration and economic development as a discretionary service have had to make considerable reductions to their budgets over recent years. The Council has delivered this by employing fewer but more highly skilled staff, and focusing activity more narrowly on priority areas to maximise impact. Going forward, we will continue to collaborate on a regional basis with the nine other Councils that make up the Cardiff Capital Region (CCR) City Deal, as it transitions into a statutory Corporate Joint Committee (CJC) by April 2024. The CJC will have responsibility for regional development and in particular the areas of strategic transport, regional economic development and strategic planning. The Council will continue to work with colleagues regionally and the CJC to understand how responsibilities will be shared between the region and local authorities to ensure the most effective outcomes overall. The City Deal created a £1.2 billion fund for investment in the region for 20 years, and it is now the intention of the CJC to continue this work. This will include long-term investments focusing on raising economic prosperity, increasing job prospects and improving digital and transport connectivity. In order to play an effective part in the Corporate Joint Committee, the Council will maintain as far as possible existing investment in its transport planning, spatial planning and regeneration teams to reflect this direction of travel. The Council will be spending in the region of £2.8 million a year running these services.

These teams will ensure successful delivery of high profile regeneration projects, including the numerous regeneration projects in Porthcawl and the redevelopment of Ewenny Road in Maesteg for both housing and employment uses, where the remediation of the site is being funded by a £3.5 million Housing Viability Grant from

the CCR. In addition, through its Metro programme, the £3.8 million Porthcawl Metrolink bus facility will be completed and provide a strong signal of the Council's commitments to sustainable travel as part of the wider regeneration scheme. The completion of the £10 million redevelopment and refurbishment of the Maesteg Town Hall, in the spring of 2024, will bring state of the art community, music, performance and library facilities to the heart of the Llynfi valley, and will safeguard this 141 year old listed building for future generations.

We have also undertaken the Examination in Public (EIP) for the replacement Local Development Plan (LDP). This will be determined by Welsh Government's Planning and Environment Decisions Wales (PEDW) and, if recommended for approval could be adopted by the Council in late spring of 2024. An important part of our budget planning is making sure that it is resourced appropriately to ensure our plan is properly researched and evidenced and sets out the development planning proposals for the County Borough which will shape its future, including housing growth. There is some £116 million of Section 106 contributions that will be forthcoming from our new replacement LDP and these are essential for delivering high quality new infrastructure, such as roads, new schools and play facilities in development areas within the Borough.

More specifically, the Council has made and continues to make good progress in pursuit of the development of our main towns. These include the regeneration of the waterfront at Porthcawl, including the Salt Lake site, the redevelopment of Maesteg Town Hall as stated above, and investment in initiatives to improve the town centre in Bridgend. This includes the development of a new £80 million Bridgend College Campus on the former police station site at Cheapside, in the town centre. The construction is due to commence in May 2024 with a completed college building anticipated by September 2026.

The Council will continue to operate a number of grant funded programmes of work to support our most vulnerable groups and those furthest away from employment, including training and skills and work support programmes under the Employability Bridgend programme. The Council has been awarded over £20 million from the Shared Prosperity Fund (SPF) to undertake various programmes with partners across the County over a three year period, including training and new business start-up grants. In addition, the £18 million funding bid to the UK Government's Levelling Up Fund (LUF) for the complete refurbishment and restoration of the Grand Pavilion in Porthcawl was successful. Design work is now underway and a planning application is being submitted. It is likely that a contractor for the works will be procured in spring 2024.

### **3.1.8 Regulatory and Corporate Services**

The Council operates a number of other services which it recognises fulfil specific and important roles. In many cases these are statutory though the precise level of service to be provided is not defined in law. The main areas are as follows:

#### Regulatory Services

This is a combined service with the Vale of Glamorgan and Cardiff City Councils, for which Bridgend will contribute around £1.9 million towards a group of services that includes Trading Standards, Environmental Health, Animal Health and



Licensing (Alcohol, Gambling, Safety at Sports Grounds, Taxis etc.). These services all ensure, in different ways, that the public is protected.

As well as allowing for financial savings, the collaboration delivers greater resilience in the service and stronger public protection across all three Council areas.

### Registrars

The Council operates a Registrar service that deals primarily with the registration of Births, Deaths and Marriages. The service also undertakes Civil Partnership and Citizenship ceremonies and provides a replacement certificate facility.

### Council Tax and Benefits

The taxation service collects over £112 million in council tax from over 66,000 households across the county borough, on behalf of the Council, South Wales Police and our Town and Community Councils. Our collection rates have been impacted in recent years, firstly by the Covid-19 pandemic, then by the cost of living crisis. We are determined to regain the pre-2020 high levels of collection, but we are seizing the opportunity to reduce the cost of operating the service, by offering online services. We now offer a range of secure council tax functions online, allowing residents to self-serve at a time and location convenient to them. This will allow us to reduce the cost of running the service.

In line with many other Welsh Local Authorities the Council has reviewed its position with regards to Council tax premiums. A Council Tax premium on empty properties has been introduced and took effect on 1 April 2023 whilst a Council Tax premium on second homes is being implemented from 1 April 2024.

Benefits are funded by the central UK government, but the administration of Housing Benefit and the Council Tax Reduction Scheme falls to the Council. The Benefits Service also administers applications for Disabled Facilities Grants, Free School Meals and Distinctive School Uniform Grants.

## **3.1.9 Other Council Wide Services**

There are a number of things that the Council does that support the delivery of services but which themselves are not visible to the public. We need to maintain these services with sufficient capacity to support our services whilst making them as efficient and effective as possible. In many cases we operate such services by sharing with other organisations. Opportunities for further collaboration or sharing in these service areas has been and will continue to be explored. There are a number of proposed budget cuts against these services for 2024-25 onwards, all of which will compromise their ability to support frontline services, and may in some circumstances be potentially counter-productive, for example, in terms of enabling the collection of additional income, or by inadvertently increasing costs in other service areas.

### Property and building maintenance

The Council continues to review its commercial property portfolio, identifying asset management opportunities and the mechanisms required to deliver a sustainable

increase in income. Alongside this, the Council is continuing to dispose of assets it no longer requires in order to deliver its services, in order to provide further investment in our capital programme.

The Council has brought together its asset management and building maintenance functions, and has centralised all premises repairs, maintenance and energy budgets into a single 'corporate landlord' service within the Communities Directorate. This enables us to better manage compliance, embed 'whole life costing' approaches into decision-making, manage the quality of work undertaken by contractors, and thereby deliver efficiencies in the management of our estate. This focus on reducing our assets and energy efficiency will be essential if the Council is to meet Welsh Government's target of all public sectors bodies being net carbon neutral by 2030. A decarbonisation strategy entitled "Bridgend 2030", was developed with the Carbon Trust and is supported with a detailed action plan, setting out how the Council will reach a net zero carbon position in Bridgend by 2030. This was approved by Cabinet in December 2022.

The service will continue to review its processes in 2024-25 including seeking further operational efficiencies and streamlined business processes, from ICT investment, improved procurement and contract management.

#### Legal services

The Council needs to maintain effective legal support for all of its services. At a time when the Council is trying to transform services it is important to bring about these changes lawfully. The service also directly supports front line services such as Education and Social Services, and is provided by a mix of permanent internal staff and external expertise when necessary. Almost half of our in-house legal team is specifically focused on child protection cases. These cases have increased in number and complexity over recent years.

The service is very lean and will have to prioritise caseloads on a risk assessed basis.

#### Finance

The Council has a central team that manages all of the financial management of the Council. This includes high level strategic advice, the Council's accounts, monitoring of financial performance and supporting the oversight and management of the Council's finances. The service fulfils certain legal requirements that ensures transparency and accountability in the way that public money is used – for example in producing accounts which are then audited and in delivering value for money in service delivery.

The Finance Section will be looking to further improve and enhance business processes to improve efficiency and also meet legislative changes. Considerable progress has been made in automating payments and the Council will continue to develop and extend this to a wider range of suppliers.

#### Human Resources (HR) and Organisational Development (OD)

With over 6,000 employees including schools, the Council needs a dedicated human

resources service. The primary role of the service is to provide professional advice, guidance and support to managers and staff on a wide range of HR and OD issues as well as provide HR services for the payment of salaries, pension, contracts and absence administration. Other services include training and development, recruitment and retention, developing employee skills and 'growing our own,' through our Graduate and Apprenticeship schemes.

Working closely with our recognised trade unions, we maintain positive and transparent employee relations arrangements.

Overall the significant workforce issues the Council is facing have led to a considerable increase in demand for these services; this is likely to continue into the new financial year as teams are restructured and new ways of working are considered.

### ICT

We are continuing to invest in the automation and digitisation of services in line with our recently approved Digital Strategy, where it is appropriate to do so, and work is ongoing to identify priority areas through the Digital Transformation Programme which will help achieve savings in future years, through the development and digitising of information-intensive processes, freeing up capacity and making efficiencies.

The ICT service is assisting the Digital Transformation Programme, supporting the changes across a range of services that in turn allow savings or improvements through more flexible working or new ways to access services. The Council spends around £5 million on its ICT services provision to support main Council activities and schools. The ICT service has focused on developing staff through the apprenticeship programme in conjunction with HR, developing skills and enabling in-house career progression.

### Procurement

The Council has a central team that provides procurement support across the range of services that we provide. Effective procurement is essential to ensuring good value for money across the Council. The central team work with services to implement corporate wide efficiencies where appropriate. The Council has adopted a Corporate Procurement Strategy which supports a number of corporate priorities. There continues to be a sustained increase in the costs of goods and services due to inflationary pressures, rise in fuel costs and shortages in the supply chain. Many tenders are being returned over the approved budget leading to additional work to re-run the process.

### Democratic Services

The Council is a democratic organisation with 51 elected members (Councillors) who make decisions, set policy direction and oversee the general performance of the Council. The number of elected members in each authority is set independently. Their remuneration is also determined by an independent panel. The Democratic Services team support all Members and ensure the appropriate arrangements are in place to comply with legislative requirements.

## Internal Audit

Our Regional Internal Audit Service is provided by a joint service that we share with the Vale of Glamorgan, Rhondda Cynon Taf and Merthyr Councils. The service carries out routine checks and investigations to ensure that the Council maintains good governance – especially as it relates to the proper accountability of money and other resources. The level of service to be provided by the joint service in 2024-25 has been reviewed.

### **3.2 The Financial Context**

3.2.1 The Council's MTFS is set within the context of UK economic and public expenditure plans, together with Welsh Government's priorities and legislative programme. The MTFS articulates how the Council plans to use its resources to support the achievement of its corporate priorities and statutory duties, including the management of financial pressures and risks over the next four years. It helps the Council to work more effectively with partners in other sectors and provides a strategy for the use of balances to meet changes in resources or demands from year to year without impacting unduly on services or council tax payers.

3.2.2 The MTFS includes:

- The principles that will govern the strategy and a four year financial forecast, comprising detailed proposals for 2024-25 and outline proposals for 2025-26 to 2027-28.
- The capital programme for 2023-24 to 2033-34, linked to priority areas for capital investment and the Capital Strategy, which will be presented for approval by Council in February 2024, along with the Treasury Management Strategy 2024-25.
- The Corporate Risk Assessment, which will be updated and included in the final MTFS in February 2024.

3.2.3 When Welsh Government announced the Final Local Government Settlement for 2023-24 in February 2023, they provided an indicative all-Wales uplift to AEF for 2024-25 of 3.1%, but stated that this was dependent on current estimates of non-domestic rates income and any 2024-25 UK budgets. No information was provided for future years.

3.2.4 The Chancellor of the Exchequer presented the Autumn Statement 2023 to Parliament on 22 November 2023. The Office for Budget Responsibility (OBR) were commissioned to prepare an economic and fiscal forecast to be presented to Parliament alongside his Autumn Statement.

3.2.5 In his Autumn Statement the Chancellor said that this was an "Autumn Statement for a country that has turned a corner. An Autumn Statement for growth." He stated that the government had delivered significant economic progress "in the face of global challenges" and that the Autumn Statement had delivered "the biggest business tax cut in modern British history" and will return tens of thousands more people into work. Announcements included reductions in employee national

insurance contributions, increases in the national living wage, support for businesses, including the extension of business rates discount and a freeze on the small business multiplier in England, and inflationary increases to benefits. According to the Office for Budget Responsibility, growth is better than expected this year but inflation has taken longer than expected to reduce, meaning interest rates have had to rise further. As a result, the OBR has downgraded its forecasts for growth for the next couple of years – 0.7% next year instead of the 1.8% previously forecast, and 1.4% in 2025, down from 1.8%.

- 3.2.6 In response to the Autumn Statement the Welsh Government Minister for Finance and Local Government said *“The Chancellor has failed to recognise the increasing pressures on public services both here in Wales and across the UK, which means there will be more incredibly difficult decisions ahead. The NHS and local authorities are facing acute challenges around social care, education, and homelessness. The continuing pressures on their budgets will have a significant impact on the future sustainability of our schools, hospitals and other vital public services.”* She summed up saying *“Today’s Autumn Statement will make a difficult process even harder, as it does nothing to ease the immense pressure on our budget and on public services in Wales.”*
- 3.2.7 Welsh Government announced their draft budget on 19 December 2023, and the provisional local government settlement on 20 December 2023. The final local government settlement is not due to be announced until the end of February 2024, so the Medium Term Financial Strategy and the budget for 2024-25 are proposed on the basis of the provisional settlement.
- 3.2.8 The Welsh Government draft budget sets out updated revenue and general capital spending plans for 2024-25, which is the final year in the three-year Spending Review period. The Minister indicated that this was a final year in which there was less funding available to meet all of their statutory commitments, let alone their priorities and ambitious Programme for Government. She also stated that following the UK Autumn Statement, their budget is now worth £1.3 billion less in real terms than when it was set in 2021. She stated that they had radically reshaped their budget so that they can focus funding on the services which matter most to people – to invest more in the NHS and to protect the core local government settlement, which in turn funds schools, social care and other vital everyday services that people rely on. Guiding principles included protecting core, frontline public services as far as possible, delivering the greatest benefit to households which are hardest hit, to prioritise jobs, wherever possible, and to work in partnership with other public sector bodies to face this financial storm together. This included investing an additional £450 million in the NHS, which is on top of the additional £425 million they made available in October for 2023-24. It also maintains the provisional Local Government settlement at 3.1%, with £1.3 million provided through the Revenue Support Grant to ensure that no authority has an increase in settlement of below 2%. The Minister did indicate that because of continued high inflation, pay pressures, high energy costs and rising demand for services, local councils will need to take difficult decisions, which may have an impact on the services they provide. She said that, in making decisions, local authorities will need to consider the impacts of their choices under the statutory requirement relating to local government.
- 3.2.9 There is a consolidation of pre-16 grant funding streams to enable local authorities to have more flexibility to react and deliver in changing circumstances, and this is at

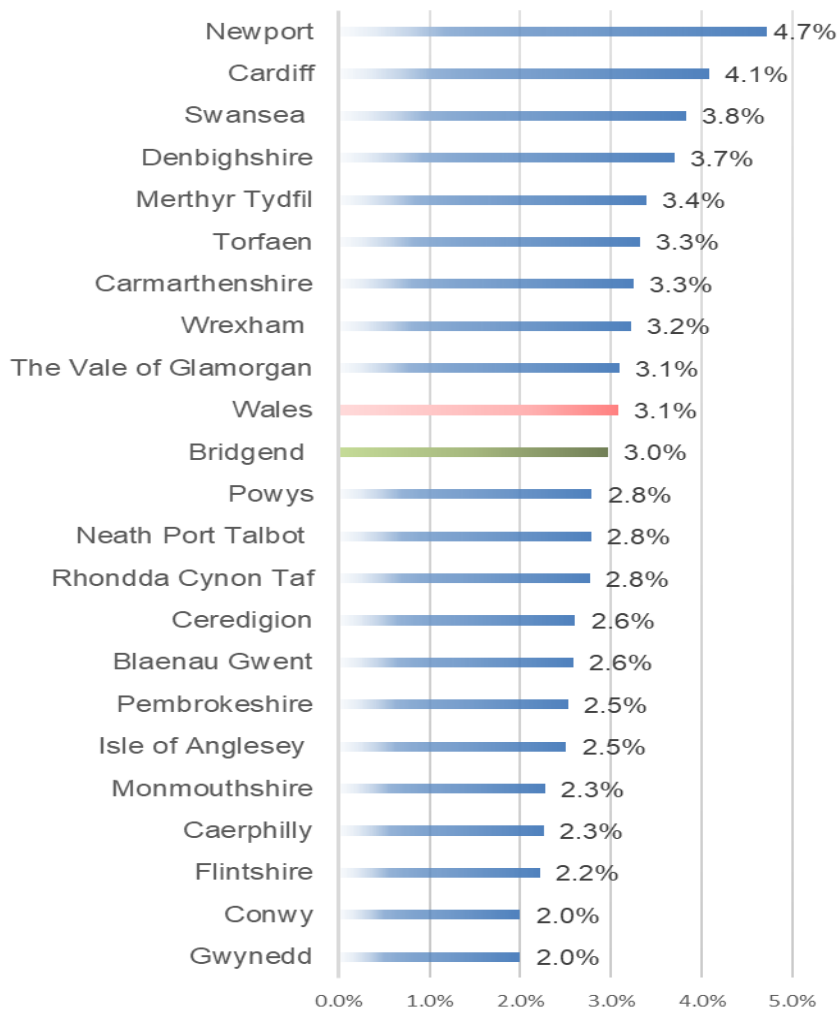
the same level of funding against similar grants provided to local authorities in 2023-24. They are also protecting the Pupil Development Grant funding that funds schools to support learners from low-income households, under their overarching equity in education objectives.

- 3.2.10 The Minister also outlined a package of additional support for Non-Domestic Rates, which included capping the increase to the Non-Domestic Rates (NDR) multiplier to 5% for 2024-25, lower than the 6.7% September CPI increase (the default inflation increase), and extending support for retail, leisure and hospitality businesses with Non-Domestic Rates bills by providing 40% relief, a reduction from the 75% relief provided in 2023-24. In addition, following revaluation of Non-Domestic Rates in 2023-24, WG is providing funding for the second year of transitional relief in 2024-25.
- 3.2.11 In terms of capital investment the Minister indicated that there were minimal changes to the multi-year allocations provided in the 2022-23 to 2024-25 budgets and that the majority of allocations for general capital would remain static.

### **3.3 Welsh Government Provisional Local Government Settlement 2024-25**

- 3.3.1 Councils received their provisional settlements from Welsh Government on 20 December 2023. The headline figure is an overall increase of 3.1% across Wales and, for Bridgend, a reported increase of 3.0% in Aggregate External Finance (AEF), which is a £7.796 million cash increase on the 2023-24 allocation. No local authority received less than a 2% increase in funding. There are not intended to be any significant changes to the methodology or the data underpinning the distribution of this settlement when the final settlement is announced at the end of February 2024. However, there may be some grant transfers into the final settlement, following work to reduce the number of separate grants paid to local authorities.

This increase for Bridgend was the tenth highest increase across all Welsh Local Authorities as illustrated in the chart below.



Source: WG Provisional LGF Settlement 2024-25

- 3.3.2 The Minister for Finance and Local Government stated ‘As we have developed the draft Budget 2024-25, which was published yesterday, we have prioritised protecting core frontline public services as far as possible; supporting the hardest hit households and prioritising jobs, where we can. We have therefore protected the indicative rise of 3.1% in the local government settlement, and in line with our focus on supporting households, this also continues to protect vulnerable and low-income households from any reduction in support through the Council Tax Reduction Scheme (CTRS).’
- 3.3.3 The Minister also stated that ‘Local authorities will need to take account of the full range of funding sources available to them, as well as the pressures they face. I encourage them to continue to carefully balance the impact of increases on household finances with the loss of support and services.’
- 3.3.4 In terms of capital funding the Minister stated that ‘With next to no increase in overall capital funding and the Welsh Government capital budget 6% lower in real terms than the current year, I have maintained the general capital funding for local authorities at £180m, the indicative level that was set last year. With soaring inflationary costs in the construction sector, I know this will mean that your authorities will have to look carefully at and prioritise your capital programmes to continue to invest to best effect in the provision of public services.’ She also

announced that she had continued to provide £20 million of capital funding in each year to enable authorities to respond to the joint priority of decarbonisation. No indications have been given for 2025-26 or beyond.

### **3.4 Settlement Implications for 2025 to 2028**

3.4.1 As mentioned above, this is the final year in the three-year Spending Review period, so no indications on funding have been provided for future years. However, recent announcements from both Welsh and UK Governments have indicated that the financial position in the next few years will be no less challenging than it is for 2024-25.

### **3.5 Transfers into and out of the 2024-25 Revenue Settlement**

3.5.1 The provisional settlement does not include any transfers of funding from Welsh Government into the Revenue Support Grant (RSG). However, Welsh Government has indicated that this may change for the final settlement as they continue to review and rationalise the number of grants that the local authority has to administer.

### **3.6 Specific Grants**

3.6.1 As part of the Welsh Government's Programme for Government, the Welsh Ministers have committed to reducing the administrative burden on local authorities, to allow them to focus on their vitally important work delivering services. At the heart of this work is their desire to ensure that local authorities are not hampered by unnecessary bureaucracy; consequently there is an amalgamation of pre-16 education grants, and work is ongoing to identify the best approach to grants in different policy areas, in collaboration with Local Government. WG expect to outline agreed changes as part of the Final Budget.

3.6.2 The picture on changes to specific grants is available at an all-Wales level for most grants, but not yet at an individual authority level. The biggest change is the rationalisation and refocusing of education specific grants, with the amalgamation of several pre-16 education grants into the Local Authority Education Grant. Many of the grants remain unchanged from 2023-24 figures, such as the Housing Support Grant and Concessionary Fares Grant, and some are yet to be finalised, including the Sustainable Waste Management Grant. There is an allocation of £93.5 million in 2024-25 to support the increased entitlement to free school meals for all primary aged pupils as agreed as part of the Plaid Cooperation agreement.

3.6.3 Welsh Government have stated that they have reprioritised £11 million from the Social Care Workforce Grant, which will impact on local authorities and social care partners. They have said that to ensure continued delivery of existing activity, including protecting spend on eliminating profit within the care of children looked after, they are reviewing planned activity and exploring efficiencies and rescoping activity until 2025-26. In addition, there is a reduction in the Communities for Work+ grant from £27 million to £17 million, and a reduction in the Bus Emergency Scheme from £42 million to £39 million.

3.6.4 Until more detailed information is made available from Welsh Government on some of these significant grants, which fund a range of important and key services within



the Council, it is prudent to retain some funding in the budget, mindful that some of it may be needed to sustain these core services.

### 3.7 Current Year (2023-24) Financial Performance

3.7.1 The in-year financial position as at 31 December 2023 is shown below.

**Table 1- Comparison of budget against projected outturn at 31 December 2023**

Directorate/Budget Area	Original Budget 2023-24 £'000	Revised Budget 2023-24 £'000	Projected Year End spend at Q3 2023-24 £'000	Projected Over / (Under) Spend 2023-24 £'000	Projected Over / (Under) Spend at Qtr 2 2023-24 £'000
<b>Directorate</b>					
Education and Family Support	137,488	145,800	146,939	1,139	1,746
Social Services and Wellbeing	92,791	99,316	111,900	12,584	12,690
Communities	30,545	34,532	34,781	249	600
Chief Executive's	24,003	25,410	26,675	1,265	248
<b>Total Directorate Budgets</b>	<b>284,827</b>	<b>305,058</b>	<b>320,295</b>	<b>15,237</b>	<b>15,284</b>
<b>Council Wide Budgets</b>					
Capital Financing	7,203	7,142	4,233	(2,909)	(2,598)
Levies	9,189	9,189	9,180	(9)	(19)
Apprenticeship Levy	650	750	788	38	19
Council Tax Reduction Scheme	16,054	16,054	15,603	(451)	(213)
Insurance Premiums	1,363	1,363	1,238	(125)	(102)
Repairs & Maintenance	670	670	630	(40)	(40)
Pension Related Costs	430	430	457	27	0
Other Council Wide Budgets	21,948	1,678	197	(1,481)	(1,399)
<b>Total Council Wide Budgets</b>	<b>57,507</b>	<b>37,276</b>	<b>32,326</b>	<b>(4,950)</b>	<b>(4,352)</b>
<b>Total</b>	<b>342,334</b>	<b>342,334</b>	<b>352,621</b>	<b>10,287</b>	<b>10,932</b>

3.7.2 The overall projected position at 31 December 2023 is a net over spend of £10.287 million comprising £15.237 million net over spend on directorates and a net under spend of £4.950 million on Council wide budgets. The overall position has slightly improved since quarter 2, but it is still showing a considerable projected net over spend position for the Council at year end, which is unprecedented and which will need to be met from reserves, both earmarked and general, if it is not eradicated during the final quarter of the year. This will put the Council at serious risk of financial sustainability going forward, especially if the Council's reserves are significantly reduced.

3.7.3 In October, the Chief Executive wrote to all members of staff to indicate that new measures were being introduced, as modelling suggested that a total of £20 million of cuts may be required to address the 2023-24 over spend as well as to fund new budget pressures in 2024-25. These included a selective vacancy freeze, not entering into any new contracts or purchasing new equipment unless absolutely necessary, and maximisation of grant and fee income. This will be further

strengthened in quarter 4 with stricter recruitment freezes, and greater checks and balances in the use of purchasing cards and general spend.

- 3.7.4 There are still a considerable number of directorate budget pressures, particularly in the Social Services and Wellbeing Directorate, which is currently showing an over spend of £12.6 million, and in respect of homelessness and home to school transport. The quarter 3 revenue budget monitoring report is also being presented to Cabinet on 16 January 2024, providing details on the reasons for the main over and under spends.

### **3.8 Medium Term Financial Strategy (MTFS) 2024-25 to 2027-28**

- 3.8.1 This section of the report sets out the proposed MTFS for the Council for the next four financial years, based on the latest information available from Welsh Government. It does not include fixed funding, expenditure or activity projections, but sets best, worst and most likely scenarios for the resources that will be available. The MTFS is reviewed regularly and amended as additional information becomes available, with the detail for future years being developed over the period of the strategy.
- 3.8.2 The development of the MTFS 2024-25 to 2027-28 is led by Cabinet and Corporate Management Board (CMB) and takes into account auditors' views, the recommendations of the Budget Research and Evaluation Panel (BREP), views of scrutiny and issues arising during 2023-24, underpinned by the ongoing aim to embed a culture of medium term financial planning closely aligned with corporate planning.
- 3.8.3 Implementation of the MTFS will continue to be led by Cabinet and CMB, supported by financial and performance data. Cabinet and CMB will seek to ensure that it is widely understood by internal stakeholders (Members, employees and Unions) and external stakeholders (citizens, businesses and partners).

### **3.9 MTFS Principles**

- 3.9.1 As well as consideration of future income and expenditure scenarios, the MTFS provides a set of clear principles which drive the budget and spending decisions over 2024-2028 and which Members and others can examine and judge the Council's financial performance against. The thirteen MTFS principles are:
1. There will be a "One-Council" approach to the Medium Term Financial Strategy with a view on long term, sustainable savings proposals that are focused on ensuring that the Council remains financially viable over the full period of the MTFS.
  2. All budget related decisions will align with the principles of the Well-being of Future Generations (Wales) Act 2015.
  3. The Council will continue to meet its statutory obligations and demonstrate how it directs resources to meet the Council's corporate priorities. Other resource strategies (including the Treasury Management Strategy and Capital Strategy) are kept under review to maintain alignment with the MTFS and the Corporate Plan.

4. The financial control system is sufficiently robust to support the delivery of financial plans and mitigate corporate risks, with adequate provision being made to meet outstanding and reasonably foreseen liabilities.
5. All services will seek to provide value for money and contribute to public value, and will continuously review budgets to identify efficiency savings.
6. Financial plans will provide an optimum balance between income and expenditure for both capital and revenue, with opportunities for generating additional income taken in line with the Council's Income Generation and Charging Policy.
7. Savings proposals are developed and include realistic delivery timescales prior to inclusion in the annual budget. An MTFS Budget Reduction Contingency Reserve will be maintained to mitigate against unforeseen delays.
8. Balances are not used to fund recurrent budget pressures or to keep down Council Tax rises unless an equivalent budget reduction or increase in Council Tax is made in the following year in recognition that balances are a one-off resource.
9. The Council Fund balance should be set at a prudent but not excessive level. This will normally be maintained at a level of 5% of the Council's net budget, excluding schools.
10. Capital investment decisions are in alignment with the Council's Capital Strategy, and mitigate any statutory risks taking account of return on investment and sound option appraisals.
11. Prudential borrowing is only used to support the capital programme where it is affordable and sustainable within the Council's overall borrowing limits and the revenue budget over the long term.
12. Decisions on the treatment of surplus assets are based on an assessment of the potential contribution to the revenue budget and the capital programme.
13. Resources are allocated to deliver transformational projects based on clear strategic plans that are kept under review by Corporate Directors to maintain alignment with the MTFS.

3.9.2 The MTFS Budget Reduction Contingency Reserve referenced in Principle 7 enables the Council to manage delays or unforeseen obstacles to the delivery of significant MTFS budget reduction proposals. No allocations have been made to date in 2023-24 from this reserve, but it is likely that this reserve will be needed going into 2024-25 due to the large number and value of budget reductions that will need to be made. The level of this reserve will be kept under review by the Section 151 officer in light of forecast difficulties in delivering specific future budget reduction proposals.

### 3.10 Council Tax

3.10.1 The 2024-25 draft Revenue Budget, shown in Table 5 below, assumes a 9.5% increase in council tax for 2024-25, which is required to enable the Council to meet the considerable financial challenges that it faces both currently and going forward, not least the ongoing pay and price pressures, along with the unprecedented number of unavoidable service pressures facing the Council as it tries to support its most vulnerable residents. This level of increase will be reviewed again following the consultation process before the final budget is agreed. Going forward an assumed annual increase of 4.5% has been included for 2025-2028.

### 3.11 MTFS Resource Envelope

3.11.1 The published provisional 2024-25 Aggregate External Finance (AEF) figure is an increase of 3.0% for Bridgend. In the MTFS 2023-24 to 2026-27, it was stated that the Council would continue to work towards a most likely scenario in its planning assumptions for 2024-25 of an annual 2% change in AEF and an assumed increase in council tax of 4.5% for 2024-25, with anticipated 0% changes to AEF for future years, recognising the ongoing uncertainty around our funding in future years. However, as stated above, as a result of the unprecedented challenges facing the Council, it is proposed to increase council tax by 9.5% for 2024-25.

3.11.2 The MTFS is regularly reviewed against service performance and external economic and fiscal information to ensure that early action can be taken as necessary to keep it and the Corporate Plan on track. This is particularly important given the current economic uncertainties, particularly in respect of fluctuating levels of inflation, in the coming months and years. In view of these uncertainties, the MTFS has been developed taking into account possible resource envelope scenarios based on percentage changes in AEF shown in Table 2.

3.11.3 Welsh Government has not given any information on likely levels of funding for 2025-26 onwards. However, indications are that the financial position will be no less challenging and that Councils should plan accordingly. Therefore, for 2025-26 onwards, given the level of funding uncertainty in future years, as well as unknown pay and price increases, we will continue to assume 0% change to AEF and an estimated council tax increase of 4.5%. However, they will continue to be monitored and will be amended as further fiscal and economic information is made known.

**Table 2 – MTFS Scenarios: % Change in AEF**

	<b>2024-25 % Change</b>	<b>2025-26 % Change</b>	<b>2026-27 % Change</b>	<b>2027-28 % Change</b>
Best Scenario	+3.0%	+1.0%	+1.0%	+1.0%
<b>Most Likely Scenario</b>	<b>+3.0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Worst Scenario	+3.0%	-1.0%	-1.0%	-1.0%

3.11.4 Table 3 shows the Council's potential net budget reduction requirement based on the forecast resource envelope, inescapable spending assumptions and assumed Council Tax increases.

**Table 3: MTFS Potential Net Budget Reductions Requirement**

	2024-25 £'000	2025-26 £'000	2026-27 £'000	2027-28 £'000	Total £'000
<b>Best Scenario</b>	16,039	3,742	3,510	3,268	<b>26,559</b>
<b>Most Likely Scenario</b>	16,039	6,322	6,115	5,900	<b>34,376</b>
<b>Worst Scenario</b>	16,039	8,902	8,669	8,428	<b>42,038</b>

### 3.12 Managing within the MTFS Resource Envelope

3.12.1 Due to the impact of current year and anticipated future pressures, the amount of budget reductions required for 2024-25 is substantial. Over the period of the MTFS the financial forecast for 2024-2028 is currently predicated on £34.3 million of budget reductions being met from Directorate and Corporate budgets. However the assumptions beneath them can change quickly and with an uncertain, but no less challenging, financial settlement likely going forward, this level of reductions is likely to change going forward. They are predicated on a number of spending assumptions, including:

- Projections for demographic changes, including an ageing population and an increasing number of young people with complex disabilities living into adulthood and adding progressively to the demand for care.
- Inflationary uplifts to support specific contractual commitments, which is difficult to predict going forward following the higher levels of inflation over the past year. The consumer price index (CPI) rate recently fell to 3.9% in the 12 months to November 2023, down from 4.6% in October, which is the lowest it has been in more than two years.
- The future impact of national policies and new legislation which may not be accompanied by commensurate funding, such as the Welsh Government's commitment to eradicate homelessness, local authorities' responsibilities in respect of responding to climate change and meeting net zero carbon targets, potential additional responsibilities arising from UK government's draft Terrorism (Protection of Premises) Bill, and the ongoing implications of the Local Government and Elections (Wales) Act 2021.
- Complying with this year's budget principle of full cost recovery, where possible. Consequently fees and charges will increase by the statutory minimum or at least CPI (as at December 2023), unless determined otherwise.
- Increases in staffing costs, including a confirmed 10.1% increase in the Real Living Wage (from £10.90 to £12.00 per hour), a 9.8% increase in the national living wage from April 2024 (from £10.42 to £11.44) and its extension to 21 and 22 year olds, along with the impact of staff pay increases in both 2023-24 and 2024-25. These include the full year effect of the teachers' pay increase of September 2023 (5% increase), the unknown teachers' pay increase in September 2024 and increases for non-teachers for 2024-25, which are still to be determined.

### 3.13 Net Budget Reduction Requirement

3.13.1 Table 4 shows the current position in respect of addressing the most likely forecast budget reduction requirement of £34.3 million. It shows that £24 million of budget reduction proposals have already been identified over the period of the MTFS, including the full £16 million required for 2024-25. However, the majority of future savings relate to school delegated budgets, which may or may not be feasible going forward, and the table shows that the Council still needs to develop proposals to the value of £10.4 million. This will require some difficult decisions to be made on the range and level of services that the Council provides going forward.

**Table 4 - Risk Status of Budget Reduction Proposals 2024-25 to 2027-28**

Year	GREEN: Proposal developed and deliverable	AMBER: Proposal in development but includes delivery risk	RED: Proposals not fully developed and include high delivery risk	Budget reductions Identified so far	Budget reductions not yet developed	Total Required
	£'000	£'000	£'000	£'000	£'000	£'000
2024-25	6,044	1,604	8,391	16,039	0	16,039
2025-26	307	2	3,849	4,158	2,164	6,322
2026-27	0	0	2,453	2,453	3,662	6,115
2027-28	0	0	1,357	1,357	4,543	5,900
<b>Total</b>	<b>6,351</b>	<b>1,606</b>	<b>16,050</b>	<b>24,007</b>	<b>10,369</b>	<b>34,376</b>
Percentage of total required	18%	5%	47%	70%	30%	100%

3.13.2 Table 4 illustrates the difficult position that the Council finds itself in financially over the life of the MTFS. For 2025-28 only 43% of savings have been identified, the majority of which relates to school delegated budgets, which leaves the Council at risk of not balancing the budget. This will depend on the level of settlement that the Council receives and the total budget reductions required to balance the budget. Indications from Welsh Government are that financial settlements in future years will still be challenging and the Council will continue to face high pay and price pressures, consequently we will continue to identify options to close the gap during the remainder of the financial year and into 2024-25, at the same time seek additional funding from Welsh Government, particularly for new responsibilities.

3.13.3 All of the proposals have implications for the Council workforce given that around two thirds of the Council's net revenue budget funds pay costs. It follows that annual real terms' reductions in Council budgets over the next four years will lead to a reduced workforce over the MTFS period. The intention is to manage such a reduction through the continuation of strong vacancy management, redeployment,

early retirements and voluntary redundancies, but some compulsory redundancies will continue to be considered and could be necessary.

### 3.14 Scrutiny and Challenge

3.14.1 We will be undertaking our annual budget consultation prior to the final budget being presented to Cabinet and Council at the end of February. The aim of the consultation will be to seek views on the priority areas for residents, in order to enable us to review and set a balanced budget. It is recognised that budget planning for 2024-25 is more uncertain than ever before, and that the Council is facing even more cost pressures than experienced in previous years, as a result of the global economic circumstances arising from the cost of living crisis, high levels of inflation and the ongoing conflict in Ukraine.

3.14.2 The results will be collated and considered by Cabinet in order to further inform final decisions on the MTFs. As a result of the uncertainty surrounding the likely amount of budget pressures, both currently known and unknown, and in an attempt to give due consideration to the outcome of the scrutiny and public consultation processes, the amount of funding that had originally been set aside for additional teachers' pension costs, but which, based on the provisional local government settlement announcement, should no longer be required, has been retained centrally to provide some flexibility before the final budget is approved. This could result in changes to any of the key elements of the budget i.e. directorate budget reductions, school budgets, council tax levels or budget pressures, in the final MTFs in February.

### 3.15 2024-25 Draft Revenue Budget

3.15.1 Table 5 shows the draft revenue budget for 2024-25. The unallocated funding mentioned above is currently within the pay and price budgets in Other Council Wide Budgets, and will be re-allocated when the final budget is determined.

**Table 5 – Draft Revenue Budget 2024-25**

	Revised Budget 2023-24	Inter-Directorate Transfers	Pay / Prices	Budget Pressures	Budget Reduction Proposals	Opening Revenue Budget 2024-25	Potential In-Year Allocations for Pay and Prices *	Potential Final Budget 2024-25
	£000	£000	£000	£000	£000	£000	£000	£000
<b>Service Directorate Budgets:</b>								
Central Education & Family Support	29,400	0	105	1,700	-1,560	29,645	1,423	31,068
Schools	114,740	0	1,803	0	-5,735	110,808	5,070	115,878
<b>Education and Family Support</b>	<b>144,140</b>	<b>0</b>	<b>1,908</b>	<b>1,700</b>	<b>-7,295</b>	<b>140,453</b>	<b>6,493</b>	<b>146,946</b>
<b>Social Services &amp; Wellbeing</b>	<b>98,436</b>	<b>0</b>	<b>17</b>	<b>8,860</b>	<b>-2,323</b>	<b>104,990</b>	<b>4,188</b>	<b>109,178</b>
<b>Communities</b>	<b>32,283</b>	<b>300</b>	<b>282</b>	<b>0</b>	<b>-2,904</b>	<b>29,961</b>	<b>2,760</b>	<b>32,721</b>
<b>Chief Executives</b>	<b>25,338</b>	<b>0</b>	<b>3</b>	<b>300</b>	<b>-3,427</b>	<b>22,214</b>	<b>1,249</b>	<b>23,463</b>
<b>Total Directorate Budgets</b>	<b>300,197</b>	<b>300</b>	<b>2,210</b>	<b>10,860</b>	<b>-15,949</b>	<b>297,618</b>	<b>14,690</b>	<b>312,308</b>
<b>Council Wide Budgets:</b>								
Capital Financing	7,142				-90	7,052		7,052
Levies	9,189			446		9,635		9,635
Repairs and Maintenance	670					670		670
Council Tax Reduction Scheme	16,054					16,054		16,054
Apprenticeship Levy	750					750		750
Pension Related Costs	430					430		430
Insurance Premiums	1,363					1,363		1,363
Other Council Wide Budgets	6,539	-300	19,364	550		26,153	-14,690	11,463
<b>Total Council Wide Budgets</b>	<b>42,137</b>	<b>-300</b>	<b>19,364</b>	<b>996</b>	<b>-90</b>	<b>62,107</b>	<b>-14,690</b>	<b>47,417</b>
<b>Net Budget Requirement</b>	<b>342,334</b>	<b>0</b>	<b>21,574</b>	<b>11,856</b>	<b>-16,039</b>	<b>359,725</b>	<b>0</b>	<b>359,725</b>

\* Actual amounts will depend upon final agreed pay awards and inflationary increases / contractual increases

3.15.2 The proposed net budget for 2024-25 will be funded by:

**Table 6 – Net Budget Funding**

	£	%
Revenue Support Grant	205,006,191	56.99
Non Domestic Rates	52,971,909	14.73
Council Tax Income	101,746,816	28.28
<b>Total</b>	<b>359,724,916</b>	<b>100%</b>

### **3.16 Council Tax Implications**

3.16.1 Based on the proposed budget of £359.725 million, there is a proposed 9.5% increase in council tax for 2024-25. This is much larger increase than we would wish to make, but a combination of increasing demand for services, cost pressures, both pay and price increases, and a below inflation settlement from Welsh Government, means that this is required in order to set a balanced budget. This proposed increase will be kept under review and confirmed when the final budget is submitted for approval in February, once the consultation process has ended.

3.16.2 As mentioned above, council tax currently only provides around 27%-28% of the Council's funding. The majority of funding comes from Welsh Government, via the Revenue Support Grant and the Council's share of non-domestic rates. An increase in council tax of 1% therefore only provides around £920,000 of additional funding.

### **3.17 Inter-Directorate Transfers**

3.17.1 There is only one inter-directorate transfer included in the budget, for £300,000, and that relates to additional funding to support the interim waste collection contract, for the period 2024 to 2026, as agreed by Cabinet at their meeting on 19 September 2023. The funding was transferred from the budget set aside for emerging pressures in the MTFS 2023-2027.

### **3.18 Pay, Prices and Demographics**

3.18.1 Pay awards for teachers, National Joint Council (NJC) and Joint Negotiating Committee (JNC) staff for 2023-24 have been agreed. They included an increase of 5% on all teachers' pay scales and allowances, an increase of £1,925 or 3.88% (whichever is higher) on all NJC pay points, and an increase of 3.5% for JNC Chief Officers and Chief Executive pay points. In terms of NJC workers the £1,925 equated to a 9.42% increase for those on the lowest scale. The NJC Committee met in November 2023 and unions are starting preparations for the 2024 pay campaign as a matter of urgency, starting with consulting on and submitting a joint pay claim. No other information is available at this time. With so much uncertainty it is difficult to determine what the pay pressure will be in 2024-25 but with a staff budget of over £200 million, every additional 1% increase will add at least a further £2 million pressure to the Council's pay budget.

3.18.2 In March 2022 Bridgend County Borough Council was officially recognised as a Real Living Wage accredited employer by the Living Wage Foundation, and all BCBC-



employed staff, including social care staff, were paid at the level of the Real Living Wage. In October 2023 it was announced by the Real Living Wage Foundation that the Real Living Wage would increase by 10.1%, from £10.90 to £12.00 per hour. The rate was to be implemented as soon as possible, but by 1 May 2024 at the latest. For in-house staff this will be paid from 1 April 2024.

- 3.18.3 Funding for price inflation in 2024-25 has been mostly retained centrally to meet provision for increases in energy costs, rents, allowances and contractual commitments, which are still largely unknown, especially given current fluctuating inflation rates. The only allocation at this time is £204,000 towards the interim waste collection contract for 2024 to 2026 as outlined in the report to Cabinet on 19 September 2023. This is in addition to the virement from the unallocated funding for budget pressures from 2023-24 (shown as an inter-directorate transfer in Table 5 and in referenced in paragraph 3.17.1). A further review of allocations will be undertaken before the final budget is agreed and any necessary amendments made. Welsh Government has already announced that there is a proposed 5% increase in the business rates multiplier for next year, from £0.535 to £0.562.
- 3.18.4 Following approval of the final budget, the remaining inflationary provision will be retained centrally and allocated during the year as any unknown or unforeseen contract price inflation is agreed, in particular where the index is set after the Council's budget is approved.
- 3.18.5 In addition to increases in pupil numbers in schools in recent years, which puts pressure on school delegated budgets, there is also evidence of an increase in the older persons' population. Wales, as a whole, has an ageing population. In Bridgend, between the 2011 census and the 2021 census there has been an increase of 21.5% in people aged 65 years and over, resulting in increased pressure on a number of service areas, including residential care, home care and the assessment and care management teams.

### **3.19 Teachers' Pensions**

- 3.19.1 In October 2023 the UK Government Department for Education published the outcome of the valuation of the Teachers' Pension Scheme based upon 2020 data. The outcome confirmed a need to increase the employer contribution rate by 5% from 1 April 2024 to ensure that the Scheme continues to meet present and future obligations. This means an increase in rate from 23.68% to 28.68%. The impact of this for Bridgend is an increased cost in employer's contributions of £3.270 million per annum. Welsh Government has stated that funding for this is expected to be provided by UK Government but not until 2024-2025. The Minister has said that she would be writing to the Chief Secretary to the Treasury to press for assurances on the level and timing of this funding. As a consequence, no provision has been made in this draft budget to meet the cost of teachers' pension increases. However, there is a risk that this funding may not be forthcoming, or may not fully cover the Council's costs. If this does happen then the Council will need to find recurrent funding to meet this pressure in-year in 2024-25 and on a recurrent basis going forward into 2025-26.

### 3.20 School Delegated Budgets

- 3.20.1 Given the difficult financial position that the Council found itself in, a 2% efficiency in school budgets (£2.118 million) was included in the MTFS for 2023-24, given that school budgets account for around a third of net revenue expenditure. For 2024-25 the overall financial position of the Council has worsened, and it is impossible to set a balanced budget without requiring schools also to make cuts, given they make up a significant percentage of the Council's net budget. Therefore it is proposed to ask schools to find further savings of 5% in 2024-25.
- 3.20.2 There are a significant number of pressures on school delegated budgets for 2024-25 and beyond, not least the full year cost of the September 2023 teachers' pay award for April to August 2024 (5% increase), new pay award for teachers from September 2024, non-teachers' pay award from April 2024 and continuing high inflation. Whilst schools will need to identify ways to meet the 5% budget reduction to contribute towards the corporate budget reduction target, this will be more than offset in terms of a cash increase by the additional funding that will be provided to them during 2024-25 to offset these additional pay and price pressures, which could reach £5 million based on current estimates.
- 3.20.3 It should be noted that the 1% efficiency target is maintained for schools for 2025-26 and beyond, in recognition of the pressures stated above, potentially lower future budget settlements and mounting external pressures across Council services.

### 3.21 Budget Pressures

- 3.21.1 During 2023-24 a number of unavoidable service budget pressures have arisen for 2024-25 and future years, and they are detailed in **Appendix A**. The total of the budget pressures identified for 2024-25 is £11.306 million and this covers those pressures deemed to be unavoidable or statutory, and tries to mitigate some of the more significant budget pressures arising in 2023-24. The funding allocated is partly to enable time for transformation of services to take place and will be subject to robust ongoing financial monitoring during 2024-25. Services have not been asked to submit general budget pressure bids in this financial year, due to the challenging financial situation, so there are likely to be additional emerging pressures arising during the year for which a small provision (£550,000) has been set aside. There may also be additional pressures arising over the coming months and consequently the total pressures requirement may change between draft and final budget.
- 3.21.2 Some of the more significant pressures facing the Authority include:
- Costs associated with supporting and protecting our most vulnerable residents, especially children.
  - Support for children with additional learning needs.
  - Funding to meet contractual price increases, especially home to school transport.
  - Increased costs of commissioned services in the social care sector following the 10.1% increase in the Real Living Wage, and in general following the 9.8% increase in the National Living Wage announced by the UK government.
  - An increase in the Fire and Rescue Authority's levy on the Council to meet pay and price increases.

### 3.22 Budget Reduction Proposals

3.22.1 Budget reduction proposals of £16.039 million for 2024-25 have been identified from service budgets to achieve a balanced budget, and these are detailed in **Appendix B**. This year it has been extremely challenging to identify reductions in service budgets in order to balance the budget, and has required difficult decisions, and proposed cuts to a number of services. This level of budget reductions is unprecedented, and will have a wide ranging impact on the level of services that the Council can provide. They are not achievable easily and will have a significant impact on staff and residents alike, but are necessary in order to set a balanced budget, or council tax would have to increase by an even higher rate.

### 3.23 Partnership Working

3.23.1 As part of the MTFs process this year, and in view of the particularly challenging financial circumstances the Council faces, a commitment was also made to review each of our main strategic partnerships to identify any potential cost savings. A summary of the main findings is set out below:

- The Shared Regulatory Service (SRS), which is operated in partnership with Cardiff and the Vale of Glamorgan Councils, was asked by the partner organisations to model the service impacts of budget reductions of between 3 to 10%. Those proposals will be considered by the SRS Joint Committee in January.
- The partnerships with Halo Leisure and Awen Cultural Trust to run our leisure facilities and library and cultural facilities respectively, were also thoroughly reviewed. These key partners are delivering services at considerably less cost than when the Council provided leisure, culture and library services internally and have added considerable social value to communities in Bridgend. In recent years both partners have increasingly focussed on supporting the most vulnerable and provide a highly effective preventative offer. There will be a need with reducing Council budgets to ensure that the partnership arrangements continue to represent best value.
- The Central South School Consortium is responsible for school improvement services across Bridgend, Cardiff, Merthyr, Rhondda Cynon Taf and Vale of Glamorgan Councils. Welsh Government is currently undertaking a review of school improvement arrangements across Wales. It is unlikely that the outcome of this review will be known until summer 2024. The local authority will consider the findings of this review in due course. In December 2023 the Central South Consortium Joint Education Service Joint Committee agreed a revenue budget for 2024-25, which included an aggregate 6.6% decrease in constituent local authority contribution levels, which equates to £35,000 for Bridgend.
- It was agreed with the Cardiff Capital Region City Deal (CCRCD) that the first year's overhead and operating costs of the Corporate Joint Committee, which is now legally required to be established, would be covered from the CCRCD reserve. This had the net effect of avoiding costs for Bridgend in 2023-24 of just over £24,000. For 2024-25 the local authority contribution will remain at the same overall level as 2023-24 but will be used to fund both the CCRCD and the Corporate Joint Committee.

### **3.24 Council Wide Budgets**

- 3.24.1 Council Wide budgets include funding for the Council Tax Reduction Scheme, costs of financing capital expenditure, levies, including that for the South Wales Fire and Rescue Authority, centrally held pay and prices provisions, insurance budgets, discretionary rate relief and centrally held building related costs. A number of these budgets are fixed and unavoidable, and therefore cannot be reduced without putting the Council at risk. The higher than anticipated pay awards in recent years, soaring inflation, and unprecedented amount of budget pressures has put also additional pressure on these budgets.
- 3.24.2 The South Wales Fire and Rescue Authority covers 10 South Wales Council areas including Bridgend County. It is funded by raising a levy on its constituent Councils, based on population. For 2024-25 the levy on Bridgend, and consequently its council tax payers, is proposed to be £8,968,576, an increase of £445,886 or 5.2% from 2023-24. This is as a result of unavoidable pay and price increases. It equates to an increase of approximately 0.5% in the council tax for the County Borough. The final budget is subject to approval by the Fire and Rescue Authority at its budget meeting in February 2024 so the final increase may change.

### **3.25 Fees and Charges**

- 3.25.1 In general, fees and charges are increased by CPI (as at December 2023), subject to rounding, or in line with statutory or service requirements, except where a clear decision is taken not to do so. Schedules of fees and charges will be reported separately, as usual, under Delegated Powers and Directorates will apply the requirements outlined in the Council's Fees and Charges Policy. As a key principle, where a decision has been taken to charge for a service, the Council will aim for full cost recovery, except where there is a conscious decision which is consistent with Council priorities, recognising that the service would then be subsidised by council tax payers. Going forward, it is proposed to review fees and charges on a rolling basis as required.
- 3.25.2 A full list of all fees and charges for 2024-25 will be published on the Council's webpages once the budget has been approved for 2024-25.

### **3.26 Council Reserves**

- 3.26.1 In line with the MTFs principle 8, the Council Fund will normally be maintained at a level of 5% of the Council's net budget, excluding schools. Details of the Council's earmarked reserves position at 31 December 2023 are shown in Table 7. These have been thoroughly reviewed during 2023-24 and a number of reserves that are no longer required have been unwound. The review included an assessment of the draw down profile and re-profiling of existing earmarked reserves. A more detailed position statement will be included in the Final MTFs report to Council on 28 February 2024.

**Table 7 – Earmarked Reserves**

Opening Balance 01 Apr 23	Reserve	Movement as at Quarter 3			Closing Balance 31 Dec 23
		Net Additions/ Reclassification	Draw-down	Unwound	
£		£	£	£	£
	<b>Corporate Reserves:</b>				
50,531,437	Capital Programme Contribution	3,013,538	-	(2,098,609)	51,446,366
3,794,440	Asset Management Reserves	355,000	(420,892)	(199,362)	3,529,186
2,978,352	Major Claims, H&S & Insurance Reserves	-	-	(848,189)	2,130,163
2,892,509	Service Reconfiguration	-	-	-	2,892,509
2,263,267	Cost of Living Fund	-	(2,263,267)	-	-
3,422,660	Change Management/Digital Transformation	(141,609)	(196,367)	(120,000)	2,964,684
1,999,789	Economic and Future Resilience Fund	-	-	(293,789)	1,706,000
<b>67,882,454</b>	<b>Total Corporate Reserves</b>	<b>3,226,929</b>	<b>(2,880,525)</b>	<b>(3,559,950)</b>	<b>64,668,908</b>
	<b>Directorate Reserves:</b>				
692,947	Education & Family Support	78,363	(184,536)	(98,690)	488,084
6,076,249	Social Services & Wellbeing	2,500,000	(1,830,605)	(100,000)	6,645,643
2,752,891	Communities	130,324	(105,744)	(69,496)	2,707,974
3,101,860	Chief Executives	153,401	(747,259)	(485,594)	2,022,408
<b>12,623,946</b>	<b>Total Directorate Reserves</b>	<b>2,862,087</b>	<b>(2,868,144)</b>	<b>(753,780)</b>	<b>11,864,109</b>
	<b>Equalisation &amp; Grant Reserves:</b>				
2,074,399	Education & Family Support	(78,363)	(50,000)	(735,634)	1,210,402
436,379	Social Services & Wellbeing	-	-	(350,379)	86,000
2,845,917	Communities	-	-	(593,953)	2,251,964
346,055	Chief Executives	(153,401)	-	-	192,654
<b>5,702,750</b>	<b>Equalisation &amp; Grant Reserves:</b>	<b>(231,764)</b>	<b>(50,000)</b>	<b>(1,679,967)</b>	<b>3,741,020</b>
6,898,038	School Balances	-	-	-	6,898,038
10,109,499	Council Fund	-	-	-	10,109,499
<b>103,216,687</b>	<b>TOTAL RESERVES</b>	<b>5,857,252</b>	<b>(5,798,669)</b>	<b>(5,993,696)</b>	<b>97,281,574</b>

### 3.27 Capital Programme and Capital Financing Strategy

3.27.1 This section of the report deals with the proposed Capital Programme for 2023-24 to 2033-34, which forms part of, but extends beyond the MTFs. It has been developed in line with the MTFs principles and reflects the Welsh Government draft capital settlement for 2024-25, which provides General Capital Funding (GCF) for 2024-25 of £180 million across Wales and of £7.965 million for the Council for 2024-25, of which £3.929 million is un-hypothecated supported borrowing, with the remaining £4.036 million provided through general capital grant. This is £43,000 less than in 2023-24. In announcing this funding the Minister for Finance and Local Government said “*With soaring inflationary costs in the construction sector, I know this will mean that your authorities will have to look carefully at and prioritise your capital programmes to continue to invest to best effect in the provision of public services.*”

3.27.2 The original budget approved by Council on 1 March 2023 has been further revised and approved by Council during the year to incorporate budgets brought forward from 2022-23, slippage into 2024-25 and any new schemes and grant approvals. A review has also been undertaken of the capital resources available to the Council, along with the capital pressures that it faces. Due to the limited capital resource available, following a number of years of significant investment in the Council’s

infrastructure, service managers have not been asked to submit capital bids for funding at this stage, although it is accepted that there are a number of capital pressures that will need financing going forward, including regeneration, decarbonisation, homelessness and digitalisation. Given limited capital resources and increasing costs of contracts, the Council will need to make difficult decisions about which capital schemes it can afford to progress, which will involve prioritisation about existing and future schemes, as not all will be affordable.

3.27.3 There are also other financial pressures arising as a result of the impact of the ongoing war in Ukraine and cost of living crisis, which are being seen in existing tender prices, and will continue to do so for some time going forward, placing pressure on the capital programme overall, including:

- Increased prices of materials, as a result of higher inflation rates, sometimes up to 25% higher than previously estimated;
- Supply chain difficulties leading to higher prices and delays in schemes being completed;
- Inability to recruit to key posts, both within the Council and companies we contract with, resulting in higher wages and overall contract costs;
- Additional requirements on schemes to achieve Welsh Government’s Net Zero commitments, which includes an aim of collectively achieving net zero across the Welsh public sector by 2030. This will lead to changes in the way we design and manage our assets, which will likely result in increased costs.

3.27.4 Following approval by Council of the Capital Strategy in February/March each year, and the subsequent quarterly monitoring reports to Cabinet and Council, any amendments to the capital programme are usually dealt with during the year rather than just as part of the MTFS. The latest capital programme was approved by Council in October 2023 and any further changes will be included in the updated capital programme presented to Council for approval on 7 February 2024 or the capital programme to be included in the final MTFS to be approved by Council on 28 February 2024.

3.27.5 The capital programme contains a number of annual allocations that are met from the total general capital funding for the Council. The proposed allocations are shown in Table 8 below.

**Table 8 – 2024-25 Proposed Annual Allocations of Capital Funding**

	<b>Proposed 2024-25 £'000</b>
Highways Structural Works	340
Carriageway Capital Works	250
Disabled Facilities Grant	1,950
Housing Renewal / Empty Property Schemes	100
Minor Works	1,130
Community Projects	50
Corporate Capital Fund (Renewals / Match Funding)	200

Street lighting / Bridge infrastructure replacement	400
ICT equipment replacement	400
2030 Decarbonisation	400
<b>Total</b>	<b>5,220</b>

### **3.28 Capital Receipts**

- 3.28.1 The disposals strategy for the period to 2030 is currently being formulated and it is anticipated that the majority of the receipts will emanate from the sale of sites within the Porthcawl Waterfront Regeneration Area. Whilst this will be the main focus of the disposal programme in the immediate future, there are two other large sites at Ewenny Road, Maesteg and at Parc Afon Ewenni, Waterton, Bridgend that will be brought forward for sale within this period. These, together with a number of smaller sites that are likely to be declared surplus to Council use, will make up the disposal programme.
- 3.28.2 Capital receipts from property disposals are subject to the exchange of contracts, so it is prudent not to commit them until we have a contractual agreement.

### **3.29 Prudential (Unsupported) Borrowing**

- 3.29.1 Total Prudential Borrowing taken out as at 1 April 2023 was £46.063 million, of which £32.2 million was outstanding. It is estimated that the total borrowed will increase to £51.844 million by the end of 2023-24.
- 3.29.2 Future prudential borrowing could include an estimated £1.822 million towards the Bridgend Smart System and Heat Programme, £0.5 million towards the cost of fleet vehicles replacement, £0.5 million towards the refurbishment of Community Children’s Play Areas and £0.5 million towards Highways’ Refurbishments.

## **4. Equality implications (including Socio-economic Duty and Welsh Language)**

- 4.1 A high level Equality Impact Assessment (EIA) will be carried out and included within the Final MTFS in March 2024. The high level EIA considers the impact of the strategy, policy or proposal on the nine protected characteristics, the Socio-economic Duty and the use of the Welsh Language.
- 4.2 The proposals contained within this report cover a wide range of services and it is inevitable that the necessary budget reductions will impact on the local population in different ways. In developing these proposals, consideration has been given to their potential impact on protected groups within the community and on how to avoid a disproportionate impact on people within these groups.

## **5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

- 5.1 The Well-being of Future Generations (Wales) Act 2015 provides a framework for embedding sustainable development principles within the activities of Council and has major implications for the long-term planning of finances and service provision.

The 7 well-being goals identified in the Act have driven the Council's seven well-being objectives.

- 5.2 The well-being objectives are designed to complement each other and be part of an integrated way of working to improve well-being for people in Bridgend County. In developing the MTFS, officers have considered the importance of balancing short-term needs in terms of meeting savings targets, with safeguarding the ability to meet longer-term objectives.
- 5.3 The proposals contained within this report cover a wide range of services and it is inevitable that the necessary budget reductions will impact on the wellbeing goals in different ways. A Well-being of Future Generations Assessment will be undertaken on proposed individual projects and activities where relevant and will feed into specific reports to Cabinet or Council.
- 5.4 The Council's approach to meeting its responsibilities under the Well-being of Future Generations (Wales) Act 2015, including acting in accordance with the sustainable development principle, is reflected in a number of areas within the Medium Term Financial Strategy, not least:

<b>5 Ways of Working</b>	<b>Examples</b>
Long Term	<ul style="list-style-type: none"> <li>• Outlining the impact of a number of different funding scenarios (Best, Most Likely and Worst) to provide an element of flexibility to the Council.</li> <li>• Majority of savings generated from making smarter use of resources with service reductions kept to a minimum and only as a last resort.</li> <li>• The development of a Capital Strategy and 10 year capital programme which reflects the Council's affordability in terms of capital receipts and borrowing.</li> <li>• Investment in capital schemes that support the Council's corporate priorities and benefits the County Borough over a longer period.</li> </ul>
Prevention	<ul style="list-style-type: none"> <li>• Investment in preventative measures to reduce the burden on more costly statutory services.</li> </ul>
Collaboration	<ul style="list-style-type: none"> <li>• Savings generated from collaboration and integrated working.</li> </ul>
Integration	<ul style="list-style-type: none"> <li>• Explicit links between the Corporate Plan, the Capital Strategy, the Treasury Management Strategy and the Medium Term Financial Strategy</li> </ul>
Involvement	<ul style="list-style-type: none"> <li>• A robust budget consultation exercise, including surveys, community engagement stands and social media debates, to inform proposals.</li> </ul>

- 5.4 The above features are aimed at ensuring the Council's finances are as healthy as they can be for future generations. Although resources are limited, they have been targeted in a way that reflects the Council's priorities, including the seven well-being goals included in Bridgend's Well-being Plan, and this is reflected in the relevant appendices. Where possible, the Council has aimed to protect front line services



and invest to save, with budget reductions targeted at making smarter use of resources, commercialisation, collaboration and transformation. The Well-Being of Future Generations (Wales) Act 2015 Assessment is attached at **Appendix C**.

## **6. Climate Change Implications**

- 6.1 The local authority's 'Bridgend 2030 – Net Zero Carbon Strategy' and Welsh Government's carbon reduction commitments will also be addressed through the Medium Term Financial Strategy, where funding allows, particularly through capital investment. Specifically they will be addressed through a number of schemes, including the School Modernisation Programme, Ultra Low Emission Vehicles, and a recurrent 2030 decarbonisation capital budget, amongst others. However, due to financial constraints, our ambition to achieve Net Zero 2030 may be compromised.

## **7. Safeguarding and Corporate Parent Implications**

- 7.1 The Medium Term Financial Strategy is aligned with BCBC's Corporate Parenting Strategy, and provides substantial investment in children's services through revenue budget pressures.

## **8. Financial Implications**

- 8.1 This report outlines the financial issues that Council is requested to consider as part of the 2024-25 to 2027-28 MTFS. The Council's Section 151 Officer is required to report annually on the robustness of the level of reserves. The current and future anticipated level of Council reserves is sufficient to protect the Council in light of unknown demands or emergencies and current funding levels. It must be emphasised that the biggest financial risks the Council is exposed to at the present time relates to the uncertainty of Welsh Government funding, both generally for local government into the medium term with recent one-year settlements, and specifically for some of the pressures the Council is currently facing in its service areas, the increasing difficulty in the delivery of planned budget reductions as well as the identification of further proposals. Therefore, it is imperative that the Council Fund balance is managed in accordance with the MTFS Principle 9, as set out in the MTFS, and it is essential that revenue service expenditure and capital expenditure is contained within the identified budgets.
- 8.2 The Section 151 Officer is also required to report to Council if they do not believe that they have sufficient resource to discharge their role as required by section 114 of the Local Government Act 1988. Members should note that there is currently sufficient resource to discharge this role.
- 8.3 The proposed budget includes estimates which take into account circumstances and events which exist or are reasonably foreseeable at the time of preparation. However, there is always a risk of change, as evidenced by the volatile economic environment of the last 12 months. Subject to the risks identified the proposed MTFS provides a firm basis for managing the Council's resources for the year 2024-25 and beyond.
- 8.4 However, the extremely challenging financial situation that the Council is facing, currently and in the coming years, cannot be under-stated. The Council's provisional settlement was less than the current rate of inflation, and the Council has no firm guarantee on what funding it may receive towards teachers' pensions. In addition,

there are significant service pressures facing the Council going into 2024-25, including those leading to the current projected £10.287 million over spend for 2023-24. There is not enough funding within the provisional settlement to meet these costs, let alone new emerging pressures. The only way to mitigate them is through service reductions or higher increases in council tax. The Council's reserves are falling, and there is little capacity to establish new reserves, so using reserves to balance the budget is not a robust or long term solution, particularly in light of the fact that these financial challenges are still likely to be facing us into 2025-26 and possibly beyond. All of these factors must all be taken into consideration when approving the budget for 2024-25 onwards.

## **9. Recommendation**

- 9.1 It is recommended that Cabinet submits for consultation with the Overview and Scrutiny Committees the 2024-25 annual budget and development of the MTFS 2024-25 to 2027-28, as set out in this report, prior to presenting a final version for approval by Council on 28 February 2024.

## **Background documents**

Individual Directorate Monitoring Reports  
Provisional Local Government Revenue and Capital Settlements 2024-25

## BUDGET PRESSURES 2024-25 TO 2027-28

			2024-25	2025-26	2026-27	2027-28
Ref	Directorate	Pressure	Recurring £000	£000	£000	£000
EFS1	Education and Family Support	Additional funding for learner support to meet the costs of increased demand for Bridgend pupils in out of county placements, as a result of insufficient space at Bridgend schools. Funding also for increased demand for additional learning needs support at schools, in particular complex medical needs, sensory support and communication and relationship support.	500			
EFS2	Education and Family Support	Increased costs for Home to School Transport as a result of higher costs being experienced following re-tenders, mainly as a consequence of shortage of drivers and increased fuel costs.	1,200			
EFS3	Education and Family Support	Revenue to support the Annual Service Payments for the Sustainable Communities for Learning (School Modernisation) Programme Band B Bridgend West Schemes under the Welsh Government's Mutual Investment Model, whereby 81% of the annual revenue cost is met by WG and 19% by the local authority over a period of 25 years.		137	684	
EFS4	Education and Family Support	Balance of £3.5m budget pressure outlined in reports to Cabinet and Council in September 2023 to address the recommended levels of resourcing for children's services, outlined in the report to the Council by the Institute of Public Care (IPC), following a review of service provision and demand. The total cost of the recommended way forward was £3.5m and £1m of this was funded via the 2023-24 budget for social services. This funding is required to strengthen the Council's statutory safeguarding accountabilities, specifically for Early Help and Edge of Care.	500			
SSW1	Social Services & Wellbeing	Funding for pay and price pressures within social services commissioned services.	3,360			
SSW2	Social Services & Wellbeing	Balance of £3.5m budget pressure outlined in reports to Cabinet and Council in September 2023 to address the recommended levels of resourcing for children's services, outlined in the report to the Council by the Institute of Public Care (IPC), following a review of service provision and demand. The total cost of the recommended way forward was £3.5m and £1m of this was funded via the 2023-24 budget. This funding is required to strengthen the Council's statutory safeguarding accountabilities, particularly Information, Advice and Assistance (IAA) and locality social work teams .	2,000			
SSW3	Social Services & Wellbeing	Increased costs of home care for adults with learning disabilities, as a consequence of an increase in the number of hours covered, and an increase in the complexity of need.	2,000			

			2024-25	2025-26	2026-27	2027-28
Ref	Directorate	Pressure	Recurring £000	£000	£000	£000
SSW4	Social Services & Wellbeing	Additional residential / nursing placements costs due to new admissions for older people and older people with mental health needs. Staffing costs have increased to manage the more challenging needs of residents.	1,000			
CEX1	Chief Executive	Increase in legal fees for children's services due to increased numbers of cases requiring King's Counsel, increased complexity and costs of cases.	300			
CW1	Council Wide	Increase in Fire Service Precept to cover pay and price increases. The final budget is subject to approval by the Fire and Rescue Authority at its budget meeting in February 2024 so the final increase may change .	446			
CW2	Council Wide	To mitigate emerging pressures, details for which are yet to be finalised. To be allocated in line with need and reported through quarterly monitoring reports.	550			
<b>Total Budget Pressures</b>			<b>11,856</b>	<b>137</b>	<b>684</b>	<b>0</b>

**Budget Reduction Proposals 2024-25 to 2027-28**

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Budget 2023-24 £'000	Total Budget Reduction 2024-2028 as % of 2023-24 Budget	2023-24 Budget Reductions £'000	Indicative 2024-25 £'000	Indicative 2025-26 £'000	Indicative 2026-27 £'000	Indicative 2027-28 £'000
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RAG STATUS KEY	
<b>RED</b>	Proposals not fully developed and include high delivery risk
<b>AMBER</b>	Proposal in development but includes delivery risk
<b>GREEN</b>	Proposal developed and deliverable

**EDUCATION & FAMILY SUPPORT**

**CENTRAL EDUCATION & FAMILY SUPPORT**

EDFS1	Reduction in staff mileage budgets	During the pandemic, most meetings were arranged virtually, instead of in person. This arrangement has continued in part with hybrid working, although there are clear cases where in-person meetings are essential. The result is that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with limited impact on service provision, but positive benefits for achieving net carbon zero.	139	13%	0	18			
EDFS2	Directorate Vacancy Management Factor	The introduction of an average 3% vacancy factor across the directorate - excluding schools, front-line services and grant-funded and income-generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	11,400	3%	0	342			
EDFS3	Cessation of the Meals-at-Home Service	While there could be a significant redundancy cost, redeployment options could be explored to mitigate this risk. A public consultation would be required prior to determination by Cabinet.	48	100%	0		48		
EDFS4	Reduction of Nursery provision	The current arrangements for Nursery provision in Bridgend are in excess of the statutory requirements and are above what many other local authorities across Wales provide. This budget reduction proposal would reduce nursery provision to the statutory minimum requirement and discontinue full-time provision for 'rising 4s'. There could be a negative impact on Welsh-medium education, particularly in relation to the development of the Welsh language in respect of rising three- and four-year-olds This could potentially have a detrimental impact on educational standards.	2,150	100%	0		1,254	896	

**Budget Reduction Proposals 2024-25 to 2027-28**

APPENDIX B

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Budget 2023-24 £'000	Total Budget Reduction 2024-2028 as % of 2023-24 Budget	2023-24 Budget Reductions £'000	Indicative 2024-25 £'000	Indicative 2025-26 £'000	Indicative 2026-27 £'000	Indicative 2027-28 £'000
EDFS5	Merging of schools - closure of infants school and merging with a junior school to create primary school provision.	This will be challenging to achieve due to a range of operational and policy considerations. It is possible that this will result in redundancies.	£114.7m - ISB Budget	0.17%	0		113	80	
EDFS6	Proposed to close 'small schools' as they become more and more unviable.	This will be challenging to achieve due to a range of operational and policy considerations. It is possible that this will result in redundancies.	£114.7m - ISB Budget	0.36%	0		239	171	
EDFS7	Income generation opportunities within the Music Service	Interest in developing a training function for schools provided by the Bridgend Music Service but this has not been costed and at a time when schools are looking to manage their service level agreements (SLAs) very carefully, this might not be possible. The national music service grant is subsidising this at the moment.	N/a - new income budget proposal	N/a	0	3	2		
EDFS8	Increase price of school meals by 30p (saving is limited due to the roll out of the universal primary free school meals (UPFSM) initiative)	The cost of school meal in Bridgend is currently one of the lowest in Wales. It is anticipated that an increase of 30p per meal would still see Bridgend as being in the bottom quartile of school meal cost across Wales. It is worth noting that there may be a decline in the take-up of a school meal following previous price increases and this may negate any savings.	1,216	2%	0	30			
EDFS9	Cessation of Adult Community Learning (ACL) provision	This would result in staff redundancies. There could be alternative options available via external partners. This saving could lead to the partnership being weakened. There will also be a loss of presence felt within local communities.	149	100%	0	149			
EDFS10	Reduction in Education Welfare Service	If the Education Welfare Service were reduced, school attendance could reduce. Given the negative impact the pandemic has had on school attendance rates (a reduction of 6% across the county borough), it is important that this service is maintained should the local authority want to support improvements in school attendance and, in turn, improve outcomes for pupils.	575	24%	0		136		

**Budget Reduction Proposals 2024-25 to 2027-28**

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Budget 2023-24 £'000	Total Budget Reduction 2024-2028 as % of 2023-24 Budget	2023-24 Budget Reductions £'000	Indicative 2024-25 £'000	Indicative 2025-26 £'000	Indicative 2026-27 £'000	Indicative 2027-28 £'000
Page 87 EDFS11	Reduction in contribution to Central South Consortium	Welsh Government is currently reviewing school improvement arrangements in Wales. The review is due to report in late spring/early summer 2024. We would look to reduce some of the central administrative functions rather than frontline services (improvement partners/principal improvement partners).	535	7%	0	35			
EDFS12	Educational Psychology Service - Reduction in equipment, mileage and staff	This may result in educational psychologists not using latest test materials for their assessments which may mean results are invalid. This could also result in a potential reduction in in-person visits to schools and an increase in online sessions. This could result in the local authority being unable to meet its statutory duties under legislation, as the statutory role of educational psychologists could not be met due to reduced capacity. The local authority could be open to legal and tribunal challenge due to missed timescales and failure to meet its statutory duties. Unidentified needs of learners and significant placement breakdowns could lead to an increase in out-of-county specialist placements requested at additional cost.	383	10%		38			
EDFS13	ALN Statutory Team - reduction to staffing structure	The local authority could be unable to meet its statutory duties. The local authority could be open to legal and tribunal challenge due to missed timescales.	184	9%		17			
EDFS14	Early Years ALN, Cognition and Learning and Complex Medical and Motor Impairment - review of pay grades, reduction in staffing numbers	There could be a reduction in training offered to schools. The team may be unable to oversee the Observation and Learning Resource Centres at the current level. The early identification of needs of pupils may not be identified as quickly as desired. Schools may not have expertise to support pupils and needs escalate.	528	9%		50			
EDFS15	The Bridge Alternative Provision - staffing reductions and charging schools for hospital education	The setting may be unable to offer pupils the option to continue their studies through the medium of Welsh (previous Estyn recommendation). There could be insufficient staff to pupil ratios which could have potential safeguarding risks and limit the number of pupils The Bridge is able to accommodate.	1,643	5%		81			

**Budget Reduction Proposals 2024-25 to 2027-28**

APPENDIX B

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Budget 2023-24 £'000	Total Budget Reduction 2024-2028 as % of 2023-24 Budget	2023-24 Budget Reductions £'000	Indicative 2024-25 £'000	Indicative 2025-26 £'000	Indicative 2026-27 £'000	Indicative 2027-28 £'000
EDFS16	Learner Support - staffing reductions	There is a statutory requirement to support young people with additional learning needs up to the age of 25. This saving could result in schools being unable to effectively manage additional learning provision, therefore potentially causing more local authority individual development plans which could cost the local authority more. This could result in an increased risk of tribunals.	157	10%		16			
EDFS17	School Modernisation budgets - review of staffing and non-staffing budgets	This could result in challenges in respect of site maintenance. This could also impact on the delivery of some capital projects.	209	11%		22			
EDFS18	Sensory Team - Hearing and visual impairment - review of staffing and non staffing budgets	This could result in a failure to meet statutory duties for hearing impaired (HI) and visually impaired (VI) learners. Learners with a HI and VI may be unable to access visits and in class support, modified resources and the school curriculum. This could result in the Learning Resource Centre not being staffed fully.	734	5%		35			
EDFS19	Communication and Relationships Team - Referrals only accepted for pupils who are at risk of permanent exclusion and placement breaking down. No longer completing observations for the ND Pathway	This could result in schools not following the local authority graduated response due to waiting times of support being implemented. Pupils placed on reduced timetables while schools await action plans could increase. This could result in pupils not progressing on the Neurodevelopmental Pathway due to specialist teachers being unable to complete professional recommendations.	1,210	12%		142			
EDFS20	Welsh in Education Strategic Plan (WESP) - reduction in translation services and review of staffing	This could result in a less co-ordinated approach to increasing Welsh-medium education and seeking opportunities to engage in activities through the Welsh-medium. WESP Coordinator to translate which would impact the ability to meet targets set within the WESP and could lead to a failure in meeting Welsh Government targets to increase Welsh-medium education.	10	100%		10			
EDFS21	School Music Service - cease payments of all Four counties ensemble financial commitments, cease all hire of vehicles for concerts etc	No offer of collaborative Four Counties activities to learners.	85	8%		7			



**Budget Reduction Proposals 2024-25 to 2027-28**

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EDFS22	Review of Home to School Transport	While transport for Nursery children is non-statutory, if this were to be removed, there could be negative impact on pupils attending Welsh-medium and faith school nursery settings in particular although numbers are relatively low (<100). Home-to-school transport for Post-16 students is non-statutory. This could result in an increased number of young people not in education, employment or training. These cuts could impact on school attendance.	8,625	9%			792		
EDFS23	Reduction in Catering Services maintenance budget	This could mean a reduction in the purchase of replacement equipment for kitchens and an inability to comply with new refuse legislation from April 2024 for food recycling. This could have an impact on the local authority's resilience to maintain school kitchens effectively.	2,195	7%		154			
EDFS24	Review of staffing structure within the Education Directorate Support Unit (EDSU)	This could result in several challenges within the directorate's business function arm including the ability to coordinate correspondence, respond to Welsh Government requests and support administrative activity.	661	10%		63			
EDFS25	Review of staffing structures and non-staffing budgets within the Corporate Health and Safety Unit (CHSU)	This could result in less specialist health and safety support available across the organisation and may require the local authority to purchase additional external support if required at a later date.	411	10%		40			
EDFS26	Review of staffing structure within Pupil Services	This could result in the directorate having less ability to discharge statutory functions (that is, school admissions, child performance licensing, chaperone licensing, child employment and the appointment of local authority governors).	197	9%		18			
EDFS27	Review of staffing structures within Early Help	This could result in increased referrals to statutory services such as Social Care, and Child and Adolescent Mental Health Services (CAMHS). This could result in reduced support for learners, parents and carers.	1,389	10%		132			

**Budget Reduction Proposals 2024-25 to 2027-28**

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EDFS28	Youth Support - redistribution of resources including the provision of a mobile youth support facility	This could result in a lack of appropriate spaces for young people to socialise can lead to them becoming isolated which in turn has a negative impact on their emotional wellbeing and mental health. This impact could be mitigated by the use of the new mobile youth provision vehicle.	383	7%		26			
EDFS29	Early Years and Childcare Team - reduction to project delivery budget (for example, training and grants available to childcare settings)	This could result in reduced training opportunities for the sector and the possibility of the team being unable to meet statutory requirements.	550	3%		14			
EDFS30	Edge of Care Services - staffing restructure	This could result in a reduction of services to children and families.	907	9%		84			
EDFS31	Youth Justice Service - review of staffing and non-staffing budgets	Loss of external provision could mean that the Bridgend Youth Justice Service would need to deploy an alternative operating model which may result in a decreased offer to young people.	373	9%		34			
<b>Total Education and Family Support</b>						<b>1,560</b>	<b>2,584</b>	<b>1,147</b>	<b>0</b>

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**Budget Reduction Proposals 2024-25 to 2027-28**

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Budget 2023-24 £'000	Total Budget Reduction 2024-2028 as % of 2023-24 Budget	2023-24 Budget Reductions £'000	Indicative 2024-25 £'000	Indicative 2025-26 £'000	Indicative 2026-27 £'000	Indicative 2027-28 £'000
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Section 1

**SCHOOLS**

SCH1	Efficiency savings against School Delegated Budgets - 5% in 2024-2025 then 1% per annum.	It is important to note that some of this impact may be mitigated by the financial support provided to schools from the local authority in assisting schools to meet cost pressures in relation to pay and pensions, and energy. Further to discussion with headteachers, the following potential impacts have been identified: 1. Risk of increased school deficit positions; 2. Potential to result in some teacher and other staff redundancies; 3. Increase in class sizes; 4. Loss of interventions; 5. Increase in staff absence; 6. Low staff morale; 7. Increased workload; 8. Reduced curriculum offer; 9. Reduced leadership/strategic thinking time; 10. Potential inability to meet statutory requirements; 11. Decrease in adult support in classrooms; 12. Increase in pupil exclusions; 13. Decline in standards; 14. Reduction in ability maintain school buildings; 15. Limited extra-curricular activity; 16. Increase in referrals for behaviour support; 17. Reduced support for learners with additional needs; 18. Reduction in professional learning opportunities; 19. Loss of expertise due to teachers and senior leaders leaving the profession.	£114.7m - ISB Budget	8% total (5% for 24-25, 1% per annum thereafter)	2,118	5,735	1,147	1,147	1,147
<b>Total Schools</b>						<b>5,735</b>	<b>1,147</b>	<b>1,147</b>	<b>1,147</b>

<b>Total Education &amp; Family Support Directorate</b>						<b>7,295</b>	<b>3,731</b>	<b>2,294</b>	<b>1,147</b>
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**SOCIAL SERVICES AND WELLBEING**

SSW1	Reduction in staff mileage budgets	During the pandemic most meetings were arranged virtually, instead of in person. This arrangement has continued in the main since then with hybrid working, although there are clear cases where in-person meetings are essential, with the result that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with no impact on service provision, but positive benefits for achieving net carbon zero.	585	22%	0	128			
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**Budget Reduction Proposals 2024-25 to 2027-28**

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SSW2	Directorate Vacancy Management Factor	The introduction of an average 3% vacancy factor across the directorate - excluding front line services and grant funded and income generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	8,456	3%	0	255			
SSW3	Non Residential Charges Income Generation	Review of the service pricing model and increasing unit costs with a view to generating additional income. Based on unit cost increase of 7.5%. Services are provided to vulnerable adults following an assessment of need. There is risk that individuals will cancel care packages and not have their needs met which could result in higher packages of care required in the future cost and/or an increase in debt recovery. Welsh Government has set a maximum charge of £100 per week that can be charged to an individual for non-residential care, so for those people already paying the maximum amount no additional income will be generated. In terms of flat rate charges such as Transport and Meals, no additional income can be generated under the current regulations.	4,235	2%	0	75			
SSW4	Remodelling Day Opportunities	As part of the wider prevention and wellbeing agenda the service is reviewing all daytime opportunities to create environments in vibrant and compassionate communities that offer a wide and diverse opportunity. This will enable the department to review how the localised community hubs are operated and managed. This will include transport arrangements, management structures and overall operation and service that is delivered. The review will include a rebalance of who operate day time services in Bridgend but could reduce the numbers attending and /or a reduction in current service provision.	3,382	6%	0	200			
SSW5	Direct Payments Reimbursements	Invest to save proposal approved to fund a staff member to manage individual direct payment cases and action surplus fund reclaims to reduce overall spend. The savings target is net of the costs of implementing this proposal.	6,016	4%	0	250			
SSW6	Achieve better value for money by Cabinet considering a recommendation to extend the Healthy living partnership	Extending the contract by up to 5 years gives BCBC some certainty on service delivery and enables stability to rebuilt within the contract prior to determining any longer term plans in line with Bridgend's strategy for leisure and it's contribution to wellbeing. The longer period created allows for a reprofiling of related services and management fee. The base management fee is also included in a proposal for 2024 - see SSW21.	1,399 (Management Fee)	14%	0				200

**Budget Reduction Proposals 2024-25 to 2027-28**

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Page 93 SSW7	Review opportunities to amend the current energy payment arrangements for the leisure contract	A formal review and extension of contract could enable a change to how energy is paid for within the partnership with a positive impact on costs. Halo currently pay their energy bills directly but if BCBC were to pay there is greater economies of scale and potential tax savings. It would likely need a contract extension and review of the contract to justify such a change.	259	17%	0	45			
SSW8	Review the full repairing lease aspect of the Health Living Partnership Programme contract and opportunities to invest differently or less within the leisure estate	The poor condition and need for investment of the leisure assets was a key driver in the development of the healthy living partnership and there have been improvements and scheduled maintenance at all venues since 2012. Council may wish to review how much funding it wishes to be spent on asset repairs and maintenance and whether the full repairing lease can be reviewed. Some small reductions may be possible by reviewing options for investment. The impact would be increased pressure on the capital/minor works programme to cover repair and replacement requirements and potentially not all investment needs would be met. The contractual implications of the outcome of the review will need to be considered.	1,399 (Management Fee)	4%	0	50			
SSW9	Review the operating costs of leisure facilities	The operating costs of the leisure buildings have progressively improved since 2012 and as such the financial savings from building closures have reduced. A review of opening hours will deliver some efficiencies in 2024. A broader leisure strategy is being developed which will inform the remodelling of leisure in the county borough for future years.	1,399 (Management Fee)	2%	0	30			
SSW10	Redevelop the indoor bowls arena space and explore redevelopment for other purposes that offer increased income generation	The operation of the indoor bowls hall at Bridgend Life Centre generates operating costs that are difficult to cover based on the seasonal usage by the indoor bowls club. Any changes to indoor bowling would not be popular and may have a negative impact on the Council's wellbeing goals. The development of the wellbeing hub inside the bowls hall has improved usage by downsizing the number of bowling rinks already. With investment there may be possibilities for seasonal increased income generation. Potential need for alternative community venue for indoor bowls. Feasibility study would be required during 2024/25.	1,399 (Management Fee)	2%	0		10	10	10

**Budget Reduction Proposals 2024-25 to 2027-28**

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Page 94 SSW11	BCBC to waive protections on concessionary pricing and discounted rates for the more vulnerable in leisure settings	These categories of user have been developed in line with the terms of the leisure contract seeking to support our most vulnerable by reducing cost as a barrier to accessing services that support wellbeing. There has been success in this and large numbers of people benefit from concessions including the means tested access to leisure scheme. This subsidy could be removed but risks would include levels of participation reducing and also related income. Many of the beneficiaries in this category are means tested. This may challenge the socio economic duty. These individuals are part of communities which have the lowest mortality rates and the highest burden of chronic disease in the county borough.	1,271	1%	0	15			
SSW12	BCBC to curtail its annual grant contributions to community centres operated on behalf of the Council	BCBC continues to pay an annual grant based on historical amounts paid to community centres operated on our behalf that are run by voluntary management committees. The costs of operating centres will have increased and the pandemic will have been challenging for many centres. The council could continue removing or reducing its grants although this may see some centre management groups curtailed and venues closed. The grants support day to day operating costs although amounts have not been inflated for many years. These grants have not been uplifted for a significant length of time. These are also located in some of the most deprived areas of the borough. If the centres ceased to operate the Council will have to determine the future use of the buildings.	30	100%	0	10	10	10	
SSW13	Council to reduce its investment into cultural services including the availability of buildings, services or resources relating to its libraries, supported employment, community venues and arts programmes	Will include consideration of a reduction in library opening hours, library resources, community centres, supported employment for people with disabilities, arts activity and resources (for BCBC to determine) and other services or venues managed on behalf of the Council. It will be for Council to determine the contractual changes it requires and the related changes to the partnership agreement. For some services there will potentially be the need for public engagement or consultation.	3,565	10%	0	360			
SSW14	Dual use facilities operated in partnership with schools to increase income generation in line with fees and charging policy	Sites are operated on a shared usage basis with management agreements. They benefit schools during the day and community beyond. In a number of instances external investment has developed facilities. An opportunity to increase charges and deliver a small saving. Operating costs have increased in recent times and no uplift. We would be looking to increase charges by a further 10%.	133	6%	0	8			

**Budget Reduction Proposals 2024-25 to 2027-28**

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SSW15	BCBC to withdraw or reduce its commitment to older persons strategy, ageing well in Bridgend and becoming an age friendly community	This would see a reduction to the older persons strategy budget which would limit BCBC to lead on Age Friendly Communities workstreams going forward. This is currently in the corporate plan. If agreed, this would require the policy to be changed. The grant to Cruse is currently funded from this cost centre so a 20k reduction applicable.	40	38%	0	15			
SSW16	BCBC to reduce or remove its support for children and young people with additional needs and families to access community activities and opportunities	BCBC Wellbeing Service currently provides staffing support for after school and holiday short break and respite support for children and young people requiring 1:1 or even 2:1 support due to their complex needs. This is done via regular opportunities and also school holiday respite support via the Discovery programme. This programme receives referrals from social work teams to support household pressures in addition to supporting the wellbeing of our more vulnerable young people. The impact would be increased Direct Payments requests, increased risk of family breakdown and enter the care system at considerable financial cost. Families fund the costs of entrance fees, refreshments etc, and grants are targeted where available.	60	50%	0	30			
SSW17	BCBC consider efficiency savings from Third Sector Contracts - bereavement services	Annual grant payment which is a small contribution to larger scale service providing bereavement support for a range of circumstances. Will have been in demand during the pandemic period in particular. Would remove an important support service for those experiencing bereavement.	5	100%	0	5			
SSW18	BCBC consider efficiency savings from Third Sector Contracts - dementia services	Annual grant payment, for which we are currently reviewing the specification, its need and how services to support people awaiting or receiving diagnosis fit within overall support available locally and regionally. Numbers of people experiencing dementia predicted to grow and reducing the resource would create demand for alternative support or services.	57	100%	0	57			
SSW19	BCBC consider efficiency savings from Third Sector Contracts - stroke services	The service is commissioned by health, where BCBC made a 20% funding contribution. This reduction would impact directly on people who receive these services. The individual impact assessments are in development.	20	100%	0	20			
SSW20	BCBC consider efficiency savings from Third Sector Contracts - hospital discharge	This is annual grant funding, in addition to money the provider receives from their commissioned contracts with BCBC, and direct funding received from WG and the region. This money has been used to increase the caseworker resource within the Agency. The loss of this service could impact negatively on timely support for people to return home from hospital.	35	100%	0	35			

**Budget Reduction Proposals 2024-25 to 2027-28**

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Page 96 SSW21	Reduction to the Healthy Living Partnership Management Fee from 2024-25	The saving will be achieved due to re-profiling the management fee and successfully securing funding from other sources to undertake improvement works/maintenance works that HALO would have otherwise undertaken. Extending the contract would support further potential for savings (SSW6). £164k of this saving relates to Management Fee and £36k relates to Leisure Client budget.	1,399 (Management Fee)	14%	0	200			
SSW22	BCBC consider efficiency savings from Third Sector Contracts - substance misuse services	This is an annual grant payment, which has the potential to be ceased. An impact assessment will need to be completed as no new referrals from BCBC have been made this year, there is a potential that people receiving this service will need ongoing care and support and result in higher packages.	34	100%	0	34			
SSW23	Reduction of the BCBC contribution towards the regional Western Bay adoption service	Based on the recent levels of refunds experienced since 2020-21, a reduction appears reasonable. The main risk is that the service may have an increase in cases where children should be placed for adoption and this will increase the usage of the regional service and associated costs.	926	27%	0	250			
SSW24	SCWDWP Training Reductions 1. Reduction in use of external venues for training delivery. 2. Increase offer of hybrid learning opportunities e.g., on-line resources, e-learning and on-line training. 3. External training courses / conferences to be supported only where there is an identified need that cannot be met by in-house resources. 4. Use of internal staff to facilitate training workshops. 5. Reduce the impact of non-attendance at training by introducing a non-attendance charge.	Insufficient availability of internal venues suitable to hold training events. Certain training requires physical attendance and specialist resources. Requires ICT equipment and skills to access on-line activities. External trainers bring specialist knowledge and skills that internal trainers could not replicate.	512	10%	0	50			
SSW25	Review of support staffing structure	Redundancy costs would have to be paid, risks in service delivery and compliance agenda which could result in poor regulatory judgements.	787	7%	0	55			
SSW26	Increasing Charges for in-house care homes	Aim for full cost recovery on in-house care home charges	1,291	11%	0	140			
SSW27	Reduction of contribution to BAVO SLA by 10%	Financial pressure on BAVO and reduced service provision for citizens of Bridgend	61	10%	0	6			
<b>Total Social Services and Wellbeing</b>						<b>2,323</b>	<b>20</b>	<b>20</b>	<b>210</b>



**Budget Reduction Proposals 2024-25 to 2027-28**

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COM1	Reduction in staff mileage budgets	During the pandemic most meetings were arranged virtually, instead of in person. This arrangement has continued in the main since then with hybrid working, although there are clear cases where in-person meetings are essential, with the result that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with no impact on service provision, but positive benefits for achieving net carbon zero.	198	17%	0	34			
COM2	Directorate Vacancy Management Factor	The introduction of an average 5% vacancy factor across the directorate - excluding front line services and grant funded and income generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	10,000	5%	0	500			
COM3	Increase garden waste subscription cost to £50 per household and £45 for pensioners (Currently £46 per household or £42 for pensioners)	Potential increase in fly tipping. Loss of subscribers especially as it is the second year the subscription has been increased. Increase would not result in full cost recovery under the current contract, but recyclable tonnages contribute to an improved recycling level against Welsh Government targets to reduce the likelihood of penalties.	Income budget £290k	4%	30	13			
COM4	Increase bulky waste charges from £25 for 3 items to £30	Potential increase in fly tipping especially as it is the second year the charge has been increased. Increase would not result in full cost recovery under the current contract, but recyclable tonnages contribute to an improved recycling level against Welsh Government targets to reduce the likelihood of penalties.	Income Budget £135k	7%	25	10			
COM5	Removal of revenue budget used to fund the Council's Cardiff Capital Region City Deal (CCRCD) capital contribution	When the CCRCD was approved by the Council it was agreed that the Council's capital contribution (circa £11.3m) would be funded from revenue contributions and a recurrent budget pressure of £598k was included in the 2017-18 revenue budget. The total funding required is now almost complete which will enable the revenue budget to be reduced accordingly.	598	100%	0	598			
COM6	Increase fees on Bereavement services, i.e. burial charges by 20%	Income target has been based on historic income levels achieved and the application of a 20% increase to current charges. There is a risk to achieving the income target if there is a reduction in burials compared with the last two years if they return to pre-pandemic levels, or if relatives seek alternative services from neighbouring authorities.	Income budget £483K	20%	0	96			

COMMUNITIES

**Budget Reduction Proposals 2024-25 to 2027-28**

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Page 98 COM7	Review of charging mechanism for the Major Projects Team within Corporate Landlord (Architects) to ensure full cost-recovery	Fees to be aligned to industry standard charge out rates to ensure continued competitive rates reflective of the fair and reasonable costs of providing the service compared to an outsourced solution. Such charge out rates to factor in total costs of the major projects team as a whole. Schemes within the capital programme that are using the services of the Major Projects Team will see an increase in the rates charged to them.	97	100%	0	97			
COM8	Closure of Bridgend Bus Station & associated public toilets	Impact on city region, connectivity hub, and potential impact on air quality due to relocation of buses. May have a detrimental impact on regional transport with no main bus station and impact on reputation of the Council. Potential impact on Bus Services Support Grant.	239	100%	0		100	139	
COM9	Cessation of Shopmobility Scheme	Non statutory service and has ceased since October 2022 following the closure of Brackla 1 Car Park.	21	100%	0	21			
COM10	Review of Porthcawl Marina berthing fees with a view to it operating on a full cost recovery basis	This would involve a review of the berth fees and other operational costs to enable full cost recovery.	32	100%	0	32			
COM11	Cessation of the Parks & Playing Fields Development Fund	In the MTFS 2020-21 to 2023-24 Council approved £75,000 of funding, for a period of two financial years, to support voluntary sports clubs based within the county of Bridgend. This funding period has now come to an end so the funding will be removed.	75	100%	0	75			
COM12	Removal of non-staffing budget within Economic Development	Budget previously used to support delivery of events, pop up business schools e.g. "rebel business school". The reduction in budget will impact on the economic support able to be provided by BCBC for similar events in the future. Will now source external grant funding for this initiative.	76	17%	0	13			
COM13	Reduce the budget available for the Climate Emergency Response Programme, including ULEV implementation	The Climate Emergency Programme will have to be remodelled. This will impact on the Welsh Government's net zero 2030 target and will now require additional grant funding from external sources or joint working with partners to achieve our ambitious targets.	455	56%	0	255			
COM14	Office Rationalisation to include closing Raven's Court and the Innovation Centre and sharing accommodation in Civic Offices with the MASH and SWP.	Opportunity to close underused buildings & save running costs. Also to increase close working relations with South Wales Police and MASH and utilise largely unused area of the Civic Offices. Will also be an opportunity to cover 190K of unrealised savings on accommodation from previous years.	N/a - new income target	N/a	0	73			

**Budget Reduction Proposals 2024-25 to 2027-28**

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COM15	Reduce weed spray from 3 times to 2 times a year, reversal to former MTFS cut.	Will impact on the perceived visual amenity of the Borough, need to look at this with grass cutting and through biodiversity measures.	20	60%	0	12			
COM16	Removal of additional budget for play equipment maintenance	Will need to maintain play areas within existing budgets & increased reliance on refurbishment programme.	40	100%	0	40			
COM17	Removal of Sponsorship for Major Events Fund	Removal of ability to sponsor major Event in 2024/2025 & receive the benefits that accrue from the global marketing opportunities that events provides. Will need to focus increased marketing activities through partnerships in future years.	25	100%	0	25			
COM18	Reduction in County Wide Strategic Regeneration Funds	Will significantly impact regeneration initiatives & remove the ability to match fund external grants and undertake feasibility studies, parking studies etc. Will impact on both by restricting the ability to match fund external grant schemes and provide regeneration opportunities in our towns centres and valleys. No town centre management activities funded in the future, including summer fayres & events.	560	54%	0	300			
COM19	Reduction in size of strategic regeneration team to release core funding	Redundancy and restructure required. Will reduce the capacity of the team to deliver regeneration schemes, will involve cessation/ omitting of projects and reprioritisation of work. Corporate Plan Obj's 2 & 3 will be impacted by the reduced resourcing so a reduction in the regeneration that can be achieved and the resulting economic benefits. Following commitment will be at risk of not be realised: 1. Deliver a regeneration strategy for the Ogmores and Garw Valleys. 2. Develop funding bids for our valleys, to enhance the economy and stimulate new job opportunities 3. Deliver a commercial property enhancement grant for all valleys high streets, to make them look better and bring properties back into commercial use. 4. Redevelop Bridgend Central Station, including improving the front public area with a transport interchange at the rear, providing links between bus services and trains, in partnership with Welsh Government and Network Rail.	220	19%	0	42			

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**Budget Reduction Proposals 2024-25 to 2027-28**

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Budget 2023-24 £'000	Total Budget Reduction 2024-2028 as % of 2023-24 Budget	2023-24 Budget Reductions £'000	Indicative 2024-25 £'000	Indicative 2025-26 £'000	Indicative 2026-27 £'000	Indicative 2027-28 £'000
Page 100 COM20	Removal of additional street cleansing resource & Tikspac Posts	Reduction in staff to undertake street cleaning, and the installation of bins and signage throughout the borough. Removal will result in inability to install any new signage or bins. The team cover sickness and leave which will impact on the ability of the team to respond in a timely manner to issues with a delay on street waste being collected. Removal of Tikspac posts as bags for dog waste are no longer funded. Will impact on the delivery of ambitions for reducing, reusing & recycling our waste as less will be collected and will have a detrimental impact on our environment with more visible waste.	125	79%	0	99			
COM21	Removal of Legionella Officer Post / Freeze Recruitment of Legionella Post (Currently vacant)	Statutory Compliance risk & risk to safety of building occupiers. Legionella compliance reported by Audit Wales as key area for improvement. Legionella compliance significantly lower than other Big 5 compliance items at circa 27%. Duties will need to be realigned within the existing team.	45	100%	0	45			
COM22	Removal of Trainee Surveyor Post (Currently Vacant)	Reduction in number of posts within the structure will impact on the effectiveness and efficiency of the service area. Removal of succession planning. Will impact posts around it who will have to pick up functions of this role. Possible impact on line manager grade and partial service restructure required	33	100%	0	33			
COM23	Reduce available property maintenance budgets in Corporate Landlord by up to 10% per asset	Risk to safety and statutory building compliance. Reduction of maintenance activity counter productive for long term asset operation. This reduction would be limited to assets where non essential maintenance items can be removed. Will have a resulting negative affect on teams delivering maintenance functions with reduction in volume of orders, but these reductions have been taken previously and could be taken again if required	1,049	10%	0	100			
COM24	Commercially let Pandy Depot	Would require existing BCBC archive storage to be condensed or relocated to other location and take time to ready for commercial letting. Reduce the amount of depot facilities for BCBC operations. Will require capital to ready for letting. Full savings unlikely until 2025-26, but partial savings are a possibility in 2024-25.	N/a - new income target	N/a	0		50		
COM25	Closure of all Community Recycling Centres by an additional day per week on the weekend.	Item is non-provisional in waste contract so negotiation would be required with the contractor, 1 day closure already accepted and this is a second day of closure occurring on a weekend. This second day of closure may have a detrimental impact on our environment with more visible waste, fly tipping and unacceptable queues at remaining facilities.	1,588	4%	0	60			

**Budget Reduction Proposals 2024-25 to 2027-28**

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Page 101 COM26	Cessation of provision of hard copy recycling calendar to all residents	Item is non-provisional so negotiation would be required with the contractor. Portal allows residents to check their collection day online but may cause some issues for those without access to internet.	45	100%	0	45			
COM27	Stop bi-annual supply of blue refuse sacks to all residents.	This saving could not be realised until 2025 due to orders already being placed for the next financial year due to delivery timescales. This would mean residents would have to provide their own bags for containment of refuse. Likely to be an unpopular change for residents who currently have these delivered with food waste liners.	257	100%	0		257		
COM28	Letting of former Woodmat Property, Brynmenyn Estate	Would maximise income but result in loss of use of asset for future depot or CRC relocation. Also, Loss of significant power supply at site for future ULEV charging facilities	N/a - new income target	N/a	0	35			
COM29	Removal of Estimator & Cost Control Manager – DLO (Currently Vacant)	Removal of post would require supervisor to undertake duties of cost control.	45	100%	0	45			
COM30	Switch Waste collection vehicles from HVO fuel to Diesel	Green deliverability as implementation is straightforward. But would represent a backwards step environmentally switching from green vegetable derived fuel back to a fossil fuel, albeit in WG Co2 reporting mechanisms minor variance.	136	100%	0	136			
COM31	Release of 2 x vacant strategic transport planning posts	No further work on statutory active travel programme and on development of active travel network and other highway infrastructure improvements impacting viability and future development. Council will not be able to fulfil the Local Development Plan policy requirements and loss of S106 contributions Inability to commit to planning performance agreements for large scale schemes/development resulting in a loss of financial contributions No submission of bids for future transport funding under Levelling Up Fund or Shared Prosperity Fund No further work on current Bridgend strategic transport priorities Failure to comply with statutory duties under the Active Travel Act and national planning policy.	202	35%	0	70			
<b>Total Communities Directorate</b>						<b>2,904</b>	<b>407</b>	<b>139</b>	<b>0</b>

**Budget Reduction Proposals 2024-25 to 2027-28**

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**CHIEF EXECUTIVES**

CEX1	Reduction in staff mileage budgets	During the pandemic most meetings were arranged virtually, instead of in person. This arrangement has continued in the main since then with hybrid working, although there are clear cases where in-person meetings are essential, with the result that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with no impact on service provision, but positive benefits for achieving net carbon zero.	38	47%	0	18			
CEX2	Directorate Vacancy Management Factor	The introduction of an average 3% vacancy factor across the directorate - excluding front line services and grant funded and income generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	16,968	3%	0	510			
CEX3	Removal of the security patrols at Brynmenyn House - Homelessness hostel	There have been significant challenges since Covid-19. Numerous Community Safety Partnership meetings have been held with ward Councillors and local residents. The security, alongside additional CCTV cameras and lighting, have been part of a package of measures to support the community cohesion. The removal / reduction of the service, would reduce visibility and ability to react to situations, and potentially increase police presence, as these were reduced due to the presence of the security.	150	100%	0	150			
CEX4	Efficiency saving target targeting supplies and services budgets within Housing Solutions	Limited impact as review has identified small historic under spends against this budget category	142	25%	0	35			
CEX5	Increase Rental income budget at Brynmenyn House - Homelessness hostel	Limited impact as proposal reflects income levels consistently achieved since the Covid-19 pandemic.	£37K income budget	170%	0	63			
CEX6	Staffing saving in Finance Section	Staff saving in finance section achieved through removal of vacant posts and potential restructuring. This will place additional pressure on remaining staff, putting deadlines for grant returns and accounts closure at risk, impacting on levels of grant income achievable.	5,176	1%	0	71			

**Budget Reduction Proposals 2024-25 to 2027-28**

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CEX7	Reduced contribution to the Regional Internal Audit Service (RIAS)	Requirement for Head of Internal Audit to provide an annual audit opinion on the Council's control environment in relation to governance, risk management and internal control, which may be more difficult if less audit work undertaken. Consultation on the budget also required with other RIAS partners.	270	10%	0	27			
CEX8	Charging the public for Pest Control Services	Look to implement a full cost recovery model for this service	67	100%	0	67			
CEX9	Reduction of ICT Printing costs	Due to the increase in working from home across the authority, savings can be explored in the ICT Print Strategy areas when the printing framework contract is considered for renewal in January 2024. The tender will be designed to be in line with the cultural shifts towards the paperless office agenda.	35	14%	40	5			
CEX10	Amend the Disclosure and Barring Service (DBS) Policy to only recheck every three years for employees governed by the Care Standards Act 2000, not for all employees who require a DBS.	This approach is being followed in neighbouring authorities, but the impact will be that the employees (outside the Care Standards Act 2000) will only have a DBS on appointment.	49	61%	0	30			
CEX11	Increase in various Registrars income budgets	Limited impact as proposal reflects income levels consistently achieved since the Covid-19 pandemic.	£291K income budget	17%	0	50			
CEX12	Increased income from Registrars' Ceremonies	Increasing the fees charged for Marriages and other ceremonies by 15%. We are currently charging below the Welsh average. The increased cost could potentially reduce demand, however the Registrar's fee is a small percentage of the overall cost of the average wedding budget. It is also an essential requirement for a wedding and it is therefore anticipated that this increase in fee will have minimal impact on demand.	£291K income budget	15%	0	43			
CEX13	Restructure of Legal Services	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 8 posts.	2,153	18%	0	379			

**Budget Reduction Proposals 2024-25 to 2027-28**

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CEX14	Reconfiguration of Business Support	Significant reduction in business support management and resilience, creating a single point of failure. Business Support is pivotal to managing the central business support to the Chief Executive, Communities and Education and Family Support Directorates. It will create a significant capacity risk in day-to-day management and add to workload pressure and stress down through the structure. The reconfiguration will look at making additional savings across the teams, but this will impact on such things as providing management information to services, particularly Corporate Landlord, supporting Legal Services accreditation to LEXEL, the ability to support minute taking of HR disciplinary and other such investigations, family support services, Youth Justice Services and performance management.	1,323	12%	0	160			
CEX15	Increase income generated from legal fees for property transactions, S106 Agreements and Highway Agreements	Currently the Service charge a set fee of £2k for the S106 process and highway agreements are based on a percentage of the estimated cost of the works for a highway scheme which is currently 1%. An estimate figure of potential increase in income has been given but this is subject to take up of the service and could be more or less.	£76K income budget	26%	0	20			
CEX16	Restructure of HR Service	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 7 posts.	2,378	12%	0	289			
CEX17	Household Canvas - Reduction / Limited Canvass Door Knocking	Will focus on poor response areas but will draw criticism from Electoral Commission.	20	45%		9			
CEX18	Restructure of Procurement Team	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 2 posts.	352	22%		76			
CEX19	Restructure of Democratic Services	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 2 posts.	536	18%		96			
CEX20	Restructure of Corporate Policy and Public Affairs Team	Service could not expand and develop as proposed. Graduates could assist until their contract expires (Nov 2024)	342	13%		45			
CEX21	Review of provision of Homelessness Service	Review the options for providing accommodation to those who are homeless by reducing reliance on hotel and private provision	4,177	10%		397			



**Budget Reduction Proposals 2024-25 to 2027-28**

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CEX22	Review of ICT Services	Review the contract for telephony services to commence from April 2024. Review the use of teams in the Authority to reduce software costs. Consider partnership working to support and enhance the ICT provision	4,367	9%		398			
CEX23	Review the provision of Partnerships and Customer Services	Reduction in capacity, reduction in service delivery, and impact on staffing levels. Review input from partners where appropriate	2,377	9%		216			
CEX24	Reduce subsidy to Citizens Advice Bureau by 10%	Financial pressure on CAB and reduced service provision for citizens of Bridgend	216	10%		22			
CEX25	Staff savings from Finance senior management team	This will require a restructure of the Finance senior management team, and potential redundancies, reducing senior leadership capacity and knowledge and experience, at a time of increasing focus and pressure on council finances. This will place additional pressure on remaining staff.	523	13%		70			
CEX26	Increase in Finance income budgets	Increase in charges to the Finance Section's clients, including schools and other services / organisations where the finance team provide support eg Consortium of Local Authorities in Wales (CLAW).	Income budget £150K	19%		28			
CEX27	Restructure of the Council's Benefits Team	This will require a restructure and potential redundancies. This would be exacerbated by annual reductions to the Housing Benefits Administration Grant, which is £20k in 2024-25. The impact will be longer times taken to process housing benefits and council tax reduction claims, more likelihood of error and fraud.	1,050	9%		90			
CEX28	Reduction of staffing in the Council Tax section	This proposal will mean the reduction of staffing, resulting in additional pressure on remaining staff, delays in processing council tax queries, and the real likelihood of reductions in the amount of council tax income being collected. The team is already dealing with additional work as a result of the introduction of council tax premiums for empty properties and the forthcoming introduction of premiums for second homes.	702	9%		63			
<b>Total Chief Executive's Directorate</b>						<b>3,427</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Budget Reduction Proposals 2024-25 to 2027-28**

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**CORPORATE / COUNCIL WIDE**

CW1	Increased income receivable from investments and loans	No impact in the short term as current income is significantly higher than budget. However, if interest rates fall below pre-pandemic levels then the level of income will fall. The council's cashflow is managed carefully to ensure security, liquidity and yield, so funding is not placed at risk. As reserves are drawn down there will be less funding available for investing and this level of income may not be achievable.	Income budget £943K	10%		90			
<b>Total Corporate / Council Wide</b>						<b>90</b>	<b>0</b>	<b>0</b>	<b>0</b>

<b>GRAND TOTAL REDUCTIONS</b>						<b>16,039</b>	<b>4,158</b>	<b>2,453</b>	<b>1,357</b>
<b>ESTIMATED BUDGET REDUCTION REQUIREMENT (MOST LIKELY)</b>						<b>16,039</b>	<b>6,322</b>	<b>6,115</b>	<b>5,900</b>
<b>REDUCTION SHORTFALL</b>						<b>0</b>	<b>2,164</b>	<b>3,662</b>	<b>4,543</b>

<b>6,194</b>	<b>307</b>	<b>0</b>	<b>0</b>
<b>1,604</b>	<b>2</b>	<b>0</b>	<b>0</b>
<b>8,241</b>	<b>3,849</b>	<b>2,453</b>	<b>1,357</b>
<b>16,039</b>	<b>4,158</b>	<b>2,453</b>	<b>1,357</b>

## WELL-BEING OF FUTURE GENERATIONS (WALES) ACT 2015 ASSESSMENT

## Project Description (key aims):

Medium Term Financial Strategy (MTFS) 2024-25 to 2027-28

**Section 1 Complete the table below to assess how well you have applied the 5 ways of working.**

<b>Long-term</b>	<p><b>1. How does your project / activity balance short-term need with the long-term and planning for the future?</b></p> <p>The development of the MTFS aims to balance short-term needs in terms of meeting savings targets, while safeguarding the ability to meet longer-term objectives. It provides a financial basis for decision making and aims to ensure that the Council's finances can be as healthy as they can be for future generations. It does this by:</p> <ul style="list-style-type: none"> <li>• Outlining the impact of a number of different funding scenarios (Best, Most Likely and Worst) to provide an element of flexibility to the Council.</li> <li>• Adhering to a clear set of MTFS principles that drive expenditure decisions.</li> <li>• Ensuring that the majority of savings are generated from making smarter use of resources with front line service reductions kept to a minimum and only as a last resort.</li> <li>• The development of a 10 year capital programme which reflects the Council's affordability in terms of capital receipts and borrowing and investment in capital schemes that support the Council's well-being objectives and benefits the County Borough over a longer period.</li> <li>• Protecting front line services as far as possible.</li> </ul>
<b>Prevention</b>	<p><b>2. How does your project / activity put resources into preventing problems occurring or getting worse?</b></p> <p>The MTFS attempts to balance investment in preventative measures against costs of reacting to unanticipated situations in statutory services. Each budget reduction proposal is weighed in terms of the impact on other areas of the Council, on the public and on the Well-being of Future Generations. Where a budget cut in one area of non-statutory prevention would lead to increased costs in another, this is not considered to be good financial management. A number of budget pressures target investment in preventative services, and budget reductions are achieved through remodelling of existing service provision to prevent more costly long term pressures. In addition, the Council's capital programme targets significant investment in refurbishing or replacing highways, buildings and other infrastructure to prevent longer term maintenance costs.</p>

<b>Integration</b>	<b>3. How does your project / activity deliver economic, social, environmental &amp; cultural outcomes together?</b>
	The Medium Term Financial Strategy is closely aligned to the Council’s Corporate Plan, with explicit links between resources and well-being objectives. The MTFS has been guided by its well-being objectives. The development of the Corporate Plan and MTFS are both the responsibility of Cabinet and the Corporate Management Board.
<b>Collaboration</b>	<b>4. How does your project / activity involve working together with partners (internal and external) to deliver well-being objectives?</b>
	A number of budget reduction proposals are achievable through inter-agency working, with the Third Sector, Social Enterprises, other local authorities and partners. These include joint services across local authorities, and with the Health Service, and new models of working internally to provide more resilient services. A number of services already collaborate with other partners and these continue to improve performance whilst operating with reducing resources.
<b>Involvement</b>	<b>5. How does your project / activity involve stakeholders with an interest in achieving the well-being goals? How do those stakeholders reflect the diversity of the area?</b>
	We will be undertaking our annual budget consultation prior to the final budget being presented to Cabinet and Council at the end of February. The aim of the consultation will be to seek views on the priority areas for residents, in order to enable us to review and set a balanced budget. It is recognised that budget planning for 2024-25 is much more uncertain and challenging than ever before, and that the Council is facing even more cost pressures than experienced in previous years, as a result of the global economic circumstances arising from the cost of living crisis, high levels of inflation and the ongoing conflict in Ukraine.  The results will be collated and considered by Cabinet in order to further inform final decisions on the MTFS.

<b>Section 2 Assess how well your project / activity will result in multiple benefits for our communities and contribute to the national well-being goals</b>		
<b>Description of the Well-being goals</b>	<b>How will your project / activity deliver benefits to our communities under the national well-being goals?</b>	<b>Is there any way to maximise the benefits or minimise any negative impacts to our communities (and the contribution to the national well-being goals)?</b>

<p><b>A prosperous Wales</b>          An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.</p>	<ul style="list-style-type: none"> <li>• Improved educational outcomes for children and young people leading to a well-educated and skilled population to meet future skills needs.</li> <li>• Improve future outcomes for young people including educational attainment, cohesive safe communities are more attractive and easier places to do business.</li> <li>• Increase productivity, employment and skills. Encourage a lower carbon economy.</li> </ul>	<p>The majority of savings will be generated from making smarter use of resources with front line service reductions kept to a minimum and only as a last resort.</p> <p>The MTFS is aligned with the Corporate Plan to achieve the Council's current well-being objectives:</p> <p>Funding is targeted in line with these priorities and in line with the 13 MTFS Principles.</p>
<p><b>A resilient Wales</b>          A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).</p>	<ul style="list-style-type: none"> <li>• Break long term cycles to secure better outcomes for people and communities.</li> <li>• Stronger individuals and communities are more resilient to change.</li> <li>• Communities place a greater value on their environment and more people get involved in local issues and recognise the importance of green space in wellbeing and as a prevention factor.</li> <li>• Healthy active people in resilient communities, volunteering, keeping young people in the local area, reducing travel to work, increased use and awareness of green spaces.</li> </ul>	<p>The impact on local communities will be monitored through the wide range of services that will continue to be provided by the Council or its partners.</p>

<p><b>A healthier Wales</b> A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.</p>	<ul style="list-style-type: none"> <li>• Improved future physical and mental well-being, by reducing health harming behaviours.</li> <li>• Promote more involvement in communities to benefit mental health, social and physical activity.</li> <li>• Focus on healthy lifestyles and workplaces, increased income linked to health.</li> </ul>	<p>The impact on local communities will be monitored through the wide range of services that will continue to be provided by the Council or its partners.</p>
<p><b>A more equal Wales</b> A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).</p>	<ul style="list-style-type: none"> <li>• Helping all children and young people to reach their full potential, by improving their early years experiences and ensure access to information to help make informed decisions. Improving outcomes for teenage parents and their children.</li> <li>• Recognising that communities are becoming more diverse. Addressing barriers that some groups have in feeling part of communities.</li> <li>• Address income inequality and health inequality, focus on disability, older people and other equality groups. Focus on increasing income and reducing the skills gap.</li> </ul>	<p>The impact on local communities will be monitored through the wide range of services that will continue to be provided by the Council or its partners.</p>
<p><b>A Wales of cohesive communities</b> Attractive, viable, safe and well-connected communities.</p>	<ul style="list-style-type: none"> <li>• Increased number of confident secure young people playing an active positive role in their communities.</li> </ul>	<p>The impact on local communities will be monitored through the wide range of services that will continue to be provided by the Council or its partners.</p>

	<ul style="list-style-type: none"> <li>• Healthy active people in resilient communities, keeping young people and skills in the local area, tackling poverty as a barrier to engagement in community life a supportive network, developed through initiatives at work, can help to support staff through challenging times in their lives.</li> </ul>	
<p><b>A Wales of vibrant culture and thriving Welsh language</b>          A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.</p>	<ul style="list-style-type: none"> <li>• Cultural settings provide support sensitive to our increasingly diverse communities and help us identify opportunities to increase the number of Welsh speakers.</li> <li>• Importance of culture and language as a focus for communities coming together.</li> <li>• Bringing more people from different cultures together. More people identifying with their community.</li> <li>• Encourage take up of sports, arts and recreation initiatives through the workplace.</li> <li>• Ensure Welsh culture and language are a part of this. Welsh language skills are beneficial to businesses and in increasing demand.</li> </ul>	<p>Compliance with the Welsh Language act and specific Welsh Language Standards will be monitored as part of the annual report.</p>
<p><b>A globally responsible Wales</b>          A nation which, when doing anything to improve the economic, social,</p>	<ul style="list-style-type: none"> <li>• Diverse, confident communities are resilient to change. Promotes a</li> </ul>	<p>The impact on local communities will be monitored through the wide range of</p>

<p>environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.</p>	<p>better knowledge of different cultures and a better knowledge of the local environment.</p> <ul style="list-style-type: none"> <li>• Healthy lifestyles include cultural activities that promote understanding of diversity of communities, different cultures, races. Promote apprenticeships to people from different backgrounds.</li> </ul>	<p>services that will continue to be provided by the Council or its partners.</p>
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<b>Section 3 Will your project / activity affect people or groups of people with protected characteristics? Explain what will be done to maximise any positive impacts or minimise any negative impacts</b>			
Protected characteristics	Will your project / activity have any positive impacts on those with a protected characteristic?	Will your project / activity have any negative impacts on those with a protected characteristic?	Is there any way to maximise any positive impacts or minimise any negative impacts?
Age:	Unknown - The impact, positive or negative, will depend on the nature of the service delivered, the specific budget reduction proposed or budget pressure funded and the service user.		This will vary according to the service provided and will be considered through individual Equality Impact Assessments (EIAs).
Gender reassignment:	See above		This will vary according to the service provided and will be considered through individual EIAs.
Marriage or civil partnership:	See above		This will vary according to the service provided and will be considered through individual EIAs.
Pregnancy or maternity:	See above		This will vary according to the service provided and will be considered through individual EIAs.
Race:	See above		This will vary according to the service provided and will be considered through individual EIAs.



Religion or Belief:	See above	This will vary according to the service provided and will be considered through individual EIAs.
Race:	See above	This will vary according to the service provided and will be considered through individual EIAs.
Sex:	See above	This will vary according to the service provided and will be considered through individual EIAs.
Welsh Language:	See above	This will vary according to the service provided and will be considered through individual EIAs.

<b>Section 4 Identify decision meeting for Project/activity e.g. Cabinet, Council or delegated decision taken by Executive members and/or Chief Officers</b>	
Cabinet	
<b>Compiling Officers Name:</b>	Deborah Exton
<b>Compiling Officers Job Title:</b>	Deputy Head of Finance
<b>Date Completed:</b>	20/12/2023

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<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>16 JANUARY 2024</b>
<b>Report Title:</b>	<b>APPOINTMENT OF LOCAL AUTHORITY GOVERNORS</b>
<b>Report Owner / Corporate Director:</b>	<b>CORPORATE DIRECTOR – EDUCATION AND FAMILY SUPPORT</b>
<b>Responsible Officer:</b>	<b>EMMA GILES SENIOR PUPIL SERVICES OFFICER</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the policy framework or procedure rules.</b>
<b>Executive Summary:</b>	<p><b>All governing bodies of maintained schools, including maintained nursery schools, in Wales must be constituted in accordance with The Government of Maintained Schools (Wales) Regulations 2005.</b></p> <p><b>All school governing bodies have four compulsory groups of governors. One of these groups is local authority governors. Local authority governors are appointed by the local authority.</b></p> <p><b>This report details recommendations for appointments to current local authority governor vacancies.</b></p>

## 1. Purpose of Report

- 1.1 The purpose of this report is to seek approval from Cabinet for the appointment of local authority governors to the school governing bodies listed at paragraph 3.1.

## 2. Background

- 2.1 In accordance with the Council's 'Guidance on the appointment of local education authority governors', approved by Cabinet on 14 October 2008, officers have considered applications received for current vacancies for local authority governor positions on school governing bodies (see paragraph 3.1 and **Appendix A**).

## 3. Current situation / proposal

- 3.1 For the 11 current local authority governor vacancies at the 10 schools in the table below, the applicants met the approved criteria for appointment as a local authority governor and there was no competition for the vacancies. Therefore, the recommended appointments are as follows:

<b>Name of applicant</b>	<b>School</b>
Ms Helen Williams	Archbishop McGrath Catholic High School
Mr Gareth Pope	Brynmenyn Primary School
Mr Paul Deenik	Coleg Cymunedol Y Dderwen
Mrs Helen Evans	Coychurch (Llangrallo) Primary School
Mrs Dawn Evans	Cynffig Comprehensive School
Mr David O'Sullivan	Litchard Primary School
Mr John Orchard	Llangewydd Junior School
Mrs Elizabeth Jones	Maesteg School
Mrs Susan Penny	Maesteg School
Mr Tom Stables	Maes yr Haul Primary School
Ms Rhian Jenkins	Ysgol y Ferch o'r Sgêr

#### **4. Equality implications (including Socio-economic Duty and Welsh Language)**

- 4.1. An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.

#### **5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

- 5.1 A Well-being of Future Generations (Wales) Act 2015 assessment has been completed. A summary of the implications from the assessment relating to the five ways of working is as follows:

##### **Long-term**

While it is desirable for local authority governors to have previous or relevant experience of the role, in the short term, the local authority may support any person for such an appointment who is interested in supporting schools, is not disqualified from being a school governor and is willing and able to dedicate the necessary time to the role.

##### **Prevention**

The local authority assesses the suitability of applicants for the local authority governor vacancy/vacancies applied for. The local authority, in conjunction with the Central South Consortium, supports governors with a comprehensive programme of both mandatory and voluntary training and access to resources, to enable them to develop and maintain their knowledge and skills, and be successful in fulfilling the role.

##### **Integration**

School governing bodies have a strategic role in running schools and ensuring that all pupils are supported to learn and achieve so that they can access opportunities for further learning and employment, know how to maintain their well-being, can play active roles in their communities and can contribute positively to society as a whole.

## **Collaboration**

School governing bodies have a strategic role in ensuring that schools safeguard the health and well-being of pupils and staff. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

## **Involvement**

The local authority treats all applications for local authority governor vacancies fairly, to ensure equality of opportunity. School governing bodies have a strategic role in ensuring that schools safeguard the health and well-being of pupils and staff. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

5.2 A summary of the implications from the assessment relating to the Council's new seven well-being objectives, is as follows:

### **1 A County Borough where we protect our most vulnerable**

School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have important responsibilities towards vulnerable children. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

### **2 A County Borough with fair work, skilled, high-quality jobs and thriving towns**

Access to good education and ensuring children have equal opportunities to realise their potential are critical to helping young people acquire the knowledge and skills they need for work. School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a strategic role in the running of a school, deciding what the school should achieve, and setting the strategic framework for getting there.

### **3 A County Borough with thriving valleys communities**

Access to good education, raising standards of achievement and ensuring children have equal opportunities to realise their potential, wherever they may reside, are critical to helping young people acquire the knowledge and skills they need for work. School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a strategic role in the running of a school, deciding what the school should achieve, and setting the strategic framework for getting there.

### **4 A County Borough where we help people meet their potential**

As school governing bodies have a strategic role in the running of a school, this includes ensuring that children and young people have access to good education and equal opportunities to realise their potential, and that our schools are safe, supportive environments providing high quality teaching.

## **5 A County Borough that is responding to the climate and nature emergency**

School governing bodies and, therefore, those appointed to serve as governors, have a shared responsibility for ensuring that teaching and learning encompasses sustainability and global citizenship.

## **6 A County Borough where people feel valued, heard and part of their community**

School governing bodies and, therefore, those appointed to serve as governors, have a role in ensuring that there is engagement with pupils and the community served by the school, listening to views and taking appropriate actions. School governing bodies have a responsibility to support supporting diversity and inclusion, and addressing discrimination.

## **7 A County Borough where we support people to live healthy and happy lives**

School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a shared responsibility for ensuring that teaching and learning encompasses healthy eating and physical activity, personal and social development, self-worth and well-being.

### **6. Climate Change Implications**

- 6.1 School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a shared responsibility for ensuring that teaching and learning encompasses sustainable development and global citizenship. Governing bodies also have a strategic role in considering the impact of net zero carbon and how to deliver this important national initiative.

### **7. Safeguarding and Corporate Parent Implications**

- 7.1 School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have important responsibilities towards vulnerable children. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in safeguarding and promoting the welfare of vulnerable children and young people.

### **8. Financial Implications**

- 8.1 There are no financial implications regarding this report.

### **9. Recommendation**

- 9.1 Cabinet is recommended to approve the appointments detailed at paragraph 3.1.

### **Background documents**

None

## Appendix A

The following table represents current and future local authority governor vacancies (up to the end of December 2023) subject to the approval of the recommended appointments in paragraph 3.1.

Name of school	Number of current and future vacancies	Latest date for submission of an application
Betws/Blaengarw Primary Federation	2 (current)	22 December 2023
Brackla Primary School	1 (current) 1 (vacant from 22 January 2024)	22 December 2023
Bryntirion Infant School	1 (current)	22 December 2023
Caerau Primary School	2 (current)	22 December 2023
Corneli Primary School	2 (current)	22 December 2023
Croesty Primary School	1 (current)	22 December 2023
Cwmfelin Primary School	1 (current)	22 December 2023
Ffaldau Primary School	2 (current)	22 December 2023
Garth Primary School	1 (current)	22 December 2023
Litchard Primary School	1 (current)	22 December 2023
Maes yr Haul Primary School	1 (current)	22 December 2023
Mynydd Cynffig Primary School	1 (current)	22 December 2023
Nantyffyllon Primary School	1 (current)	22 December 2023
Newton Primary School	1 (vacant from 22 January 2024)	22 December 2023
Nottage Primary School	3 (current)	22 December 2023
Pencoed Primary School	1 (current)	22 December 2023
Pîl Primary School	1 (current)	22 December 2023
Plasnewydd Primary School	1 (current)	22 December 2023
Tremains Primary School	1 (current)	22 December 2023

Tynyrheol Primary School	2 (current)	22 December 2023
Ysgol Bryn Castell	1 (current)	22 December 2023
Brynteg School	1 (vacant from 22 January 2024)	22 December 2023
Cynffig Comprehensive School	1 (vacant from 22 January 2024)	22 December 2023
Coleg Cymunedol Y Dderwen	1 (current)	22 December 2023
Porthcawl Comprehensive School	1 (vacant from 22 January 2024)	22 December 2023
Ysgol Gyfun Gymraeg Llangynwyd	1 (current)	22 December 2023



<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>16 JANUARY 2024</b>
<b>Report Title:</b>	<b>DEMOLITION OF BRACKLA 1 MULTI-STOREY CARPARK NETWORK RAIL BASIC ASSET PROTECTION AGREEMENT (BAPA)</b>
<b>Report Owner / Corporate Director:</b>	<b>CORPORATE DIRECTOR COMMUNITIES</b>
<b>Responsible Officer:</b>	<b>KEVIN MULCAHY GROUP MANAGER HIGHWAYS AND GREEN SPACES</b>
<b>Policy Framework and Procedure Rules:</b>	<b>This report seeks a waiver under paragraph 3.2.11 of the Council’s Contract Procedure Rules from the requirement to obtain quotes or tenders, in relation to occasions where the contract can only be performed by a statutory undertaker. Also to enter into agreement with Aldi and Asda to manage the interface with these neighbouring properties.</b>
<b>Executive Summary:</b>	<b>In order to expedite the demolition of Brackla 1 car park the report seeks a waiver under paragraph 3.2.11 of the Council’s Contract Procedure Rules to the requirement to obtain quotes or tenders, as the provider of the services in relation to the South Wales mainline is Network Rail who are the sole provider that can grant the necessary permission to allow work that may affect the operational line. This is undertaken by entering into a Basic Asset Protection Agreement (BAPA) that is required before demolition can commence, which details arrangements for the safety of the operational railway.</b>  <b>Approval is also sought to delegate authority in respect of entering into agreements with adjacent properties in relation to demolition works.</b>

## 1. Purpose of Report

- 1.1 The purpose of the report is to inform Cabinet of progress on the proposed demolition of Brackla 1 multi storey car park.
- seek approval to enter into a Basic Asset Protection Agreement (BAPA) with Network Rail in accordance with the permitted waiver under rule 3.2.11 of the Council’s Contract Procedure Rules.

- delegate authority to the Director of Communities, in consultation with the Chief Officer - Legal & Regulatory Services, HR & Corporate Policy and Chief Officer – Finance, Performance and Change, to negotiate and agree the final terms of the BAPA and enter into the agreement and to approve the prepayment of fees under that agreement.
- delegate authority to the Corporate Director – Communities, in consultation with the Chief Officer – Finance, Performance and Change and Chief Officer – Legal & Regulatory Services, HR & Corporate Policy, to negotiate and agree the final terms of the relevant agreements with Aldi and ASDA and to enter into those agreements.

## **2. Background**

2.1 The long stay multi-storey car park 'Brackla 1' on Cheapside in Bridgend town centre is to be demolished. This follows a structural assessment in 2019 in which non-destructive techniques identified defects that required attention, including the following:

- Shear head detail was suggested as having potentially a low factor of safety.
- Structure susceptible to spalling concrete from soffits structure.

2.2 The estimated cost of the works to remedy the identified defects was considerable, and it was considered that the structure did not warrant the expenditure as further significant repairs would likely be required within a short period. Consequently, demolition was identified as the preferred option.

## **3. Current situation / proposal**

3.1 The physical demolition of Brackla 1 is not straightforward due to the type of construction method used in its formation in the form of lift slab, whereby the decks were cast one on top of the other at ground level then jacked up to the final level off the columns. These were being supported off the columns using steel shims or wedges that transferred the weight of the deck into the columns. This construction type can become unstable as elements are demolished or removed.

3.2 Additionally, Brackla 1 is in proximity of the South Wales main rail line, and Network Rail require that all works adjacent to the operational railway are executed in a safe methodology and time. To the East and West, the car park is bounded by the ALDI and Asda supermarkets, whilst to the South is the public highway.

3.3 In relation to Aldi and ASDA due to the proximity of the demolition of the car park in relation to these properties, it is proposed to put agreements in place to manage any potential impact of the demolition upon these neighbouring properties and include for pre and post inspections as well as management of any other consequential impacts that may arise due to the demolition activities.

3.4 The relationship with Network Rail is different due to the powers they discharge as the operating body in charge of safety on the adjacent rail mainline. Network Rail is a statutory undertaker responsible for maintaining and operating railway infrastructure and has statutory obligations to protect that infrastructure and ensure the safe operation of the railway network. Network Rail requires that third parties

working on or near the rail infrastructure enter into asset protection agreements with them to determine the parties' obligations and liabilities towards one another when undertaking such works. As such Bridgend County Borough Council (BCBC) will need to enter into a Basic Asset Protection Agreement (BAPA) with Network Rail and, through that agreement, agree to meet the costs arising from Network Rail's involvement in this project.

- 3.5 Under the Council's Contract Procedure Rules there is a requirement that the provision of goods, works or services to the Council be procured through prescribed tendering or quotation procedures. Rule 3.2.11 of the Council's Contract Procedure Rules provides a waiver from the requirement of obtaining quotes or tendering where the contract can only be performed by a statutory undertaker. Where the value of the contract exceeds £100,000 there is a procedural requirement that approval to rely on any waiver be sought from Cabinet. In this instance services required can only be provided by Network Rail as statutory undertaker and, as such, cannot be provided by another party or agency.
- 3.6 One of the conditions stipulated by Network Rail in the BAPA is that prepayment of their estimated cost of carrying out the services associated with the project is required. The total estimated costs have yet to be provided by Network Rail and will not be available until the appointed demolition contractor puts forward their demolition methodology and enters into negotiation with Network Rail. Under paragraph 9.4 of the Council's Financial Procedure Rules "The Chief Finance Officer, in consultation with a Cabinet Member, can give approval for payment in advance of goods or services in exceptional circumstances and on request from a Chief Officer". This authorisation will be secured before the prepayment is made.
- 3.7 Tenders have been invited for the demolition of Brackla 1 and once the contract has been awarded will require the nominated contractor to enter into negotiation with Network Rail on appropriate requirements to protect the mainline during demolition works through the stages of the project. During this process the details required within the BAPA will be developed between parties for subsequent agreement with BCBC as the client.

#### **4. Equality implications (including Socio-economic Duty and Welsh Language)**

- 4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.

#### **5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

- 5.1 The Well-being of Future Generations (Wales) Act 2015 Assessment Template has been completed and a summary of the implications from the assessment relating to the five ways of working is outlined below in respect of the proposal:
  - **Long-term**  
The structure is exhibiting structural issues with an accepted recommendation with regard to its demolition and reuse of the site. In order to carry out the demolition it is a requirement to enter into agreements with neighbouring

parties in order to safely carry out the demolition works and minimise the impact of the demolition.

- **Prevention**

Failure to demolish the structure in a controlled manner may introduce risks to others and as such appropriate means are being sought to undertake the works.

- **Integration**

The parking provision is no longer available and as such the reuse of the site for other service provision is appropriate.

- **Collaboration**

The proposal seeks to remove a structure that needs to be demolished and entering into agreement with neighbouring parties to ensure the works are carried out in an appropriate manner.

- **Involvement**

Working with neighbouring parties to manage any potential impact upon the South Wales rail mainline and adjacent businesses.

5.2 The impact on the Council's 7 Well-being Objectives has been considered and the report is relevant to Objective 2 'Improving our town centres, making them safer and more attractive' in that the multistorey car park has structural issues and the accepted recommendation is for its demolition which will release the site for redevelopment.

## **6. Climate Change Implications**

6.1 There are no direct implications on climate change in relation to the removal of the structure.

## **7. Safeguarding and Corporate Parent Implications**

7.1 There are no direct safeguarding and corporate parenting implications as a result of the content provided within this report.

## **8. Financial Implications**

8.1 The cost of entering into a BAPA are yet to be established but without this agreement the demolition works may not be able to be progressed. Provision has been set aside for the demolition works, from within the existing revenue budget, via a contingency bid, and through an established earmarked reserve. This includes a provisional sum identified for the BAPA. Currently all returned costs are within estimates, however, should additional funding be required the directorate will seek additional funding either from unwinding other existing earmarked reserves or other uncommitted revenue funding.

## **9. Recommendations**

9.1 It is recommended that Cabinet: -

- i. Note the progress on the proposed demolition of Brackla 1 and the discussions with Network Rail leading to the compilation of the Basic Asset Protection Agreement (BAPA).
- ii. Approve entering into a BAPA with Network Rail in accordance with the permitted waiver under rule 3.2.11 of the Council's Contract Procedure Rules.
- iii. Delegate authority to the Corporate Director – Communities, in consultation with the Chief Officer – Finance, Performance and Change and Chief Officer – Legal & Regulatory Services, HR & Corporate Policy, to negotiate and agree the final terms of the BAPA and enter into the agreement and/or any further deeds and documents which are supplemental to the BAPA.
- iv. Note that approval for the advanced payment will be sought at a later date in accordance with paragraph 9.4 of the Financial Procedure Rules once the fee level is known.
- v. Delegate authority to the Corporate Director – Communities, in consultation with the Chief Officer – Finance, Performance and Change and Chief Officer – Legal & Regulatory Services, HR & Corporate Policy, to negotiate and agree the final terms of the relevant agreements with Aldi and ASDA and to enter into those agreements.

#### **Background documents**

None

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<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>16 JANUARY 2024</b>
<b>Report Title:</b>	<b>URBAN AND RURAL GRASS CUTTING</b>
<b>Report Owner / Corporate Director:</b>	<b>CORPORATE DIRECTOR - COMMUNITIES</b>
<b>Responsible Officer:</b>	<b>KEVIN MULCAHY GROUP MANAGER - HIGHWAYS AND GREEN SPACES</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the Council's policy framework or procedure rules as a result of this report</b>
<b>Executive Summary:</b>	<b>The report outlines a proposal to return urban and rural grass cutting to an in-house provision. In 2015 a decision had been made, linked with a Medium Term Financial Strategy (MTFS) saving, to outsource the provision of the service. Against the backdrop of ongoing budgetary pressures within the authority, bringing the service in-house seeks to provide greater flexibility in maintaining a service provision within the existing budget.</b>

## 1. Purpose of Report

The purpose of this report is to seek approval to reintroduce the in-house delivery of urban and rural grass cutting.

## 2. Background

- 2.1 In February 2015 Cabinet approved the appointment of contractors to provide an urban and rural grass cutting service through a tendered contract, rather than the existing in-house provision, which provided a net saving of £132k of MTFS savings for the Authority.
- 2.2 In 2019 a proposal to reduce urban grass cutting from 7 times to 5 times per year was consulted upon and agreed by Cabinet, with a further decision made to delegate authority to the Cabinet Member - Communities for the approval of identified areas where grass cutting could be discontinued. Since that date urban and rural grass cutting has been undertaken through tendered contracts at the revised reduced frequency, with the current contract expiring on 31 March 2024.

## 3. Current situation / proposal

- 3.1 A proposal has been made to return urban and rural grass cutting to an in-house provision after the current contract expires. A preference for an in-house service has been expressed by the Cabinet Member for Communities in consideration of

better control of the overall delivered service when considered in the context of other grass cutting operations that already occur in-house.

- 3.2 Ongoing financial pressures on the authority and a continuing need to identify budget reductions, to ensure a balanced budget, requires that we must reconsider how services are delivered. It is anticipated that the cost to maintain the current service level from an external provider would increase due to inflationary pressures being seen within the economy and would exceed the currently available budget. Whilst we also have inflationary pressures (pay/prices) internally, returning the service in-house can provide greater flexibility to react to budget challenges, and our ability to manage changes to service levels that reflect available resources and the ability to modify our delivery model or service levels in a more responsive way going forward, to ensure provision is retained within budget.
- 3.3 However, in trying to achieve the foregoing it is recognised that the green spaces service will need an element of restructuring to enable the planning and delivery of an in-house service. Work is already ongoing to assess the full implications in terms of staffing, equipment and potential changes to operational practice that would offer a greater degree of flexibility in service provision. Appropriate consultation will take place with TU's once structures are clear, but there is no expected detriment or loss of employment for BCBC staff from this proposal.
- 3.4 The cutting of open space is to all intents and purposes driven by aesthetic considerations. In extreme circumstances i.e. little or no cutting taking place, health and safety concerns may arise i.e. fire risk in dry summers. The cutting of grass alongside highways - high speed roads, is driven more by safety considerations - maintaining sight lines, vision splays etc., with aesthetics being a secondary consideration. There is no stipulation in highway legislation of minimum maintenance levels. The obligation is simply to implement a regime of maintenance. The level of maintenance adopted is, in principle, a decision for the Council but the level of maintenance must demonstrate that the authority has taken such care as in all the circumstances was reasonably required to secure that the highway is safe for ordinary use and not dangerous for traffic. There are also non-statutory codes of practice available which set out best practice guidance on management of the highway and on 14<sup>th</sup> March 2023 Cabinet approved a revised safety inspection regime based on the recommendations of the UK Roads Liaison Group update of its code of practice, and an all Wales review and standardisation by County Surveyors' Society Wales (CSSW) to align with an all Wales approach to highway maintenance.
- 3.5 The purpose for bringing the report before Cabinet at this time is due to the tight timescales required to commence a service by Spring/Summer 2024, by which time it will be necessary to consider, resolve and implement a range of issues such as any implications of TUPE legislation, procurement of plant and equipment, revised management structure and job evaluation consultation, recruitment and training of staff, risk assessments and scheduling of works. It should be noted that the current contract is unable to be extended beyond the end date of 31<sup>st</sup> March 2024, hence the preparatory work already being undertaken to meet the expressed preference of an in-house provision.

#### **4. Equality implications (including Socio-economic Duty and Welsh Language)**



4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.

## **5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

5.1 The Well-being of Future Generations (Wales) Act 2015 Assessment Template has been completed and a summary of the implications from the assessment relating to the five ways of working is outlined below in respect of the proposal:

- **Long-Term:** The provision of an in-house grass cutting provision enables flexibility in service provision and planning for the longer term
- **Prevention:** In-house provision means that the level of service can be more flexibly adjusted which provides better control of delivered service
- **Integration:** Improving control of the overall grass cutting provision will benefit communities in the effective management of green spaces.
- **Collaboration:** In-house provision of rural and urban grass cutting will take into account working with internal partners such as highways in delivery of the service and prioritisation of provision as required.
- **Involvement:** In terms of the project, internal stakeholders will be part of the process of assessing the management of rural and urban grass cutting and the outcomes being sought.

## **6. Climate Change Implications**

6.1 There are no direct implications on climate change in relation to the proposal.

## **7. Safeguarding and Corporate Parent Implications**

7.1 There are no direct safeguarding and corporate parenting implications as a result of the content provided within this report.

## **8. Financial Implications**

8.1 The cost for reintroduction of the service provision is to be delivered from existing budgets. The staffing structure and equipment is currently being provided by an external provider, the cost of which is being met by the Authority through the contract value, so it is envisaged that sufficient funding is available within the existing budget to establish an in-house service and procure the requisite plant and equipment to facilitate the work activities. Any potential increases in costs will have to be managed through a review of the level of service provision to remain within allocated budgets.

## **9. Recommendations**

9.1 It is recommended that Cabinet:

- Approve the return of the urban and grass cutting service to an in-house provision.
- Delegate authority to the Cabinet Member - Climate Change and Environment to agree changes to the level of service provision to meet the available budget.

**Background documents:** None

# Agenda Item 9

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>16 JANUARY 2024</b>
<b>Report Title:</b>	<b>ANNUAL CORPORATE SAFEGUARDING REPORT 2022-23</b>
<b>Report Owner / Corporate Director:</b>	<b>CORPORATE DIRECTOR SOCIAL SERVICES AND WELLBEING</b>
<b>Responsible Officer:</b>	<b>CLAIRE MARCHANT CORPORATE DIRECTOR OF SOCIAL SERVICES AND WELLBEING</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the policy framework or procedure rules.</b>
<b>Executive Summary:</b>	<b>This report provides details of the corporate safeguarding activity undertaken for the year 2022-23, including data on the number of safeguarding referrals to both adults and children's services this year and in comparison to previous years. It outlines the way in which Bridgend County Borough Council (BCBC) has worked collaboratively with the regional safeguarding board, the implementation of new models of practice and provides details of Education Safeguarding activity including audit information.</b>

## **1. Purpose of Report**

- 1.1 The purpose of this report is to present Cabinet with the 2022-23 Annual Corporate Safeguarding Report for approval.

## **2. Background**

- 2.1 Safeguarding means protecting people's health, wellbeing and human rights, and enabling them to live free from harm, abuse, and neglect. It is a corporate responsibility for BCBC to safeguard vulnerable individuals from harm, abuse, and neglect.

2.2 Under the Social Services and Well-being (Wales) Act 2014, Section 7 refers to safeguarding and created new legislation against which the Council is required to function regarding safeguarding. It provides the legal framework for improving the well-being of people who need care and support, carers who need support, and for transforming social services in Wales. The Annual Corporate Safeguarding Report attached as **Appendix 1** provides details as to how the Council has performed against those statutory duties.

### **3. Current situation / proposal**

3.1 The Annual Corporate Safeguarding Report includes details on:

- Safeguarding (Adults & Children)
- Regional Safeguarding Boards
- Bridgend Corporate Safeguarding Policy
- Exploitation
- Deprivation of Liberty Standards (DoLS)
- Violence Against Women, Domestic Abuse and Sexual Violence (VAWDASV)
- Children and Adult Practice Reviews
- Education and family support
- Partnership and community safety
- Workforce
- Housing
- Out of country placements and Operating Without Registration placements

3.2 The report highlights the increase in demand on both Adult and Children's Social Care. Referrals have increased in both areas, which has resulted in higher caseloads of work and pressures placed upon social work teams. However, this increased demand continues to be processed and managed successfully within compliance targets.

3.3 The report details information regarding the number of safeguarding referrals made to both adults and children's teams, including those where thresholds were not met. It provides information relating to the number of Deprivation of Liberty Safeguards (DoLS) that have been applied for, as well as detailing information regarding children that have been required to be deprived of their liberty. This can be for a number of reasons such as if they are in a residential setting requiring high staff ratios or if they are unable to access the community without constant supervision.

3.4 Provided in the report is information as to how many children have been placed on the Child Protection Register (CPR) throughout this time period, as well as providing information relating to how Public Law Outline (PLO) and Care Proceedings (CP) have been processed and supported.

- 3.5 The report contains details as to how the new model of practice, Signs of Safety, has been adopted and implemented into Children’s services.
- 3.6 The report outlines the process that was required relating to the review of the Corporate Safeguarding Policy which has been updated and strengthened in terms of the approach to self-evaluation, management of risk and governance arrangements.
- 3.7 The Annual Corporate Safeguarding Report was presented to the Subject Overview and Scrutiny Committee 2 on 6<sup>th</sup> of December 2023, following which a recommendation was made to present this report to Cabinet in order for members to be fully sighted and aware of their responsibilities regarding safeguarding and the need to ensure appropriate scrutiny over scrutiny activity and to request that adequate resource is allocated in order to discharge our functions appropriately, especially in light of the ongoing budget pressures. Alongside this, Scrutiny requested comparative data to be included within the full report from the previous 5 years to allow a trend analysis of the data to be able to be provided and for the full picture as to how the Council is responding toward its statutory safeguarding responsibilities.

**4. Equality implications (including Socio-economic Duty and Welsh Language)**

- 4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. It is considered that there will be no significant or unacceptable equality impacts because of this report.

**5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

- 5.1 The Act provides the basis for driving a different kind of public service in Wales, with 5 ways of working to guide how public services should work to deliver for people. The following is a summary to show how the 5 ways of working to achieve the well-being goals have been used to formulate the recommendations within this report.

Involvement	Colleagues from across the Directorate from both adults and children’s services and safeguarding teams have fed into the Annual Corporate Safeguarding Report.
Long term	This Annual Corporate Safeguarding Report provides an overview of the safeguarding activity for the

	previous year. This allows the Council to project what future safeguarding activity and requirements may be required of the Social Services and Wellbeing (SSWB) Directorate and thus provide additional safety to our most vulnerable individuals in Bridgend.
Prevention	The report highlights developments by the Directorate in line with the Social Services and Well-being (Wales) Act 2014. These developments help the Council to improve its safeguarding processes and responses to safeguarding matters and thus preventing the likelihood of additional harm coming to vulnerable individuals.
Integration	The Corporate Safeguarding Policy has been reviewed and updated to provide all staff with up-to-date information relating to their safeguarding requirements. In addition to this, safeguarding is a mandatory corporate training module for all to complete and to integrate the learning and understanding across the Council.
Collaboration	Work continues in collaboration with the Cwm Taf Morgannwg Regional Partnership Board (RPB) and the Cwm Taf Morgannwg Regional Safeguarding Board (CTMSB), as well as multi-agency working with South Wales Police, social landlords, health colleagues, and the third sector.

## **6. Climate Change Implications**

6.1 There are no climate change implications as a result of this report.

## **7. Safeguarding and Corporate Parent Implications**

7.1 Details provided within the Annual Report on how staff are supported and continue to improve and strengthen safeguarding arrangements is a key theme throughout the Annual Report and remains a key priority for 2023-24. Safeguarding is the responsibility of all Council Directorates. With a view to promoting awareness of this and raising the profile of Safeguarding across the whole of the Council, the Corporate Safeguarding Policy has been reviewed and reimplemented.

## **8. Financial Implications**

8.1 Whilst there are no direct financial implications from this report, the medium- and long-term sustainability of social services, well-being and prevention, presents growing challenges on the Council to meet these responsibilities and deliver a balanced budget.

## **9. Recommendation**

- 9.1 It is recommended that Cabinet approve the 2022-23 Annual Corporate Safeguarding Report.

### **Background documents**

None

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**Bridgend County Borough Council  
Annual Corporate Safeguarding Report – 2022/23**

**The purpose of this Annual Report is to provide information on Bridgend County Borough Council’s (the Council) performance in respect of safeguarding adults and children at risk. The report covers the following areas:**

<b>Content</b>	<b>Page</b>
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**Safeguarding:**

Safeguarding means protecting people's health, wellbeing, and human rights, and enabling them to live free from harm, abuse, and neglect.

**Safeguarding Legislation and Wales Safeguarding Procedures:**

The key legislation relating to safeguarding children and adults at risk are the Social Services and Well-being (Wales) Act 2014 (SSWBA) and the Children Act 1989.

Part 7 of the SSWBA relates to Safeguarding. Part 7 includes:

- Definitions of an ‘adult and child at risk’.
- A duty on relevant partners to report adults and children at risk.
- A requirement on a local authority to investigate where they suspect that an adult with care and support needs is at risk of abuse or neglect.
- The introduction of an Adult Protection and Support Order (APSO).
- The requirement on the local authority to consider undertaking an investigation when there has been a report that a child is at risk and then carry this out in line with Section 47 of the Children Act 1989.
- The establishment of a National Safeguarding Board.
- The functions and procedures of Safeguarding Adults and Safeguarding Children Boards.

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Safeguarding duties under the SSWBA apply to adult protection, as safeguarding is preventative as well as protective. Safeguarding is wider than the essential focus on those most at risk or needing protection from abuse, neglect, and harm. Safeguarding includes ensuring the provision of safe and effective care; protecting from abuse, neglect, and harm; optimising well-being, voice, choice and control, and preventing impairment of health and development.

Safeguarding is everyone's business. However, the SSWBA sets out duties for Local Authorities and relevant partner agencies to work together to safeguard and protect children and adults at risk.

Section 47 of the Children Act 1989 sets out the duty on a local authority, with the help of other organisations as appropriate, to make enquires if they have reasonable cause to suspect that a child is suffering harm, to enable them to decide whether they should take any action to safeguard and promote the child's welfare.

The Wales Safeguarding Procedures (WSP) were launched in November 2019 and provide a detailed framework for safeguarding adults and children at risk.

### **Safeguarding Adults at Risk**

The SSWBA placed a new duty to report an "adult at risk". There was also a new duty for a Local Authority to make enquiries if it has reasonable cause to suspect that a person within its area (whether or not ordinarily resident there) is an adult at risk. Where there is reasonable cause to suspect that an adult is at risk of abuse or neglect the Local Authority has a duty to undertake section safeguarding enquiries which are known as section 126 enquiries. These enquiries should normally be completed within seven days and enquiries should be made to determine what actions may be required to support the adult at risk and any ongoing protection planning that may be required.

These enquiries should be person centred and ensure that the adult is consulted and spoken with to determine their understanding of the situation and any support needs they may have as well as considering potential risks. The duties placed on the Local Authority by the SSWBA, have resulted in a significant increase in the number of safeguarding enquiries being undertaken. This has resulted in increased numbers of citizens coming to the attention of Social Services.

**Table 1** below shows the number of adults at risk referrals received from 01/10/2022 until 30/9/2023, and shows the number that met the threshold for Adult Safeguarding procedures to commence:

	<b>01/10/2022 to 30/09/2023</b>
<b>Number of Safeguarding Referrals</b>	593
<b>Met threshold for Adult Protection Procedure</b>	74
<b>The number of Adult at Risk referrals that section 126 enquiries were completed</b>	555
<b>The number of Adult at Risk referrals that progressed to a strategy meeting</b>	75

**Table 1**

## Appendix 1

36 cases did not progress as an adult at risk. This can be for a variety of reasons, but one example is as follows:

***Mr A declined consent to progress this safeguarding referral and has been deemed to have capacity to do so. There is no wider public interest in overriding his consent. Additional advice has been provided to him and this will continue.***

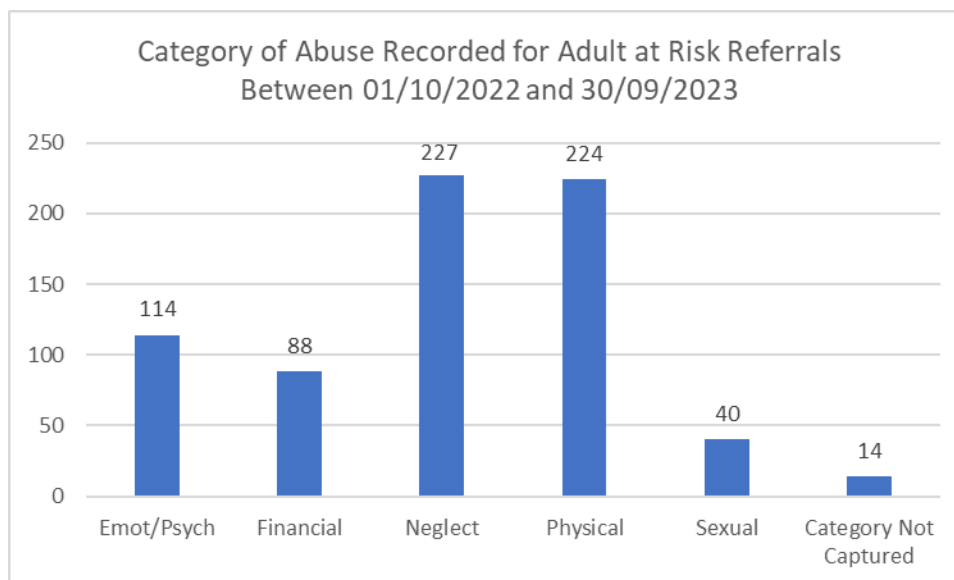
	2018/19	2019/20	2020/21	2021/22	2022/23	01/04/2023 to 30/09/2023
Number of Safeguarding Referrals	275	325	372	388	488	360
The number of Adult at Risk referrals that section 126 enquiries were completed	261	313	357	350	468	338
The number of Adult at Risk referrals that progressed to a strategy meeting	55	69	67	72	66	34

**Table 2**

Table 2, above, shows comparative data from the previous 5 years involving the number of safeguarding referrals received, as well as the number of referrals that progressed through the relevant stages.

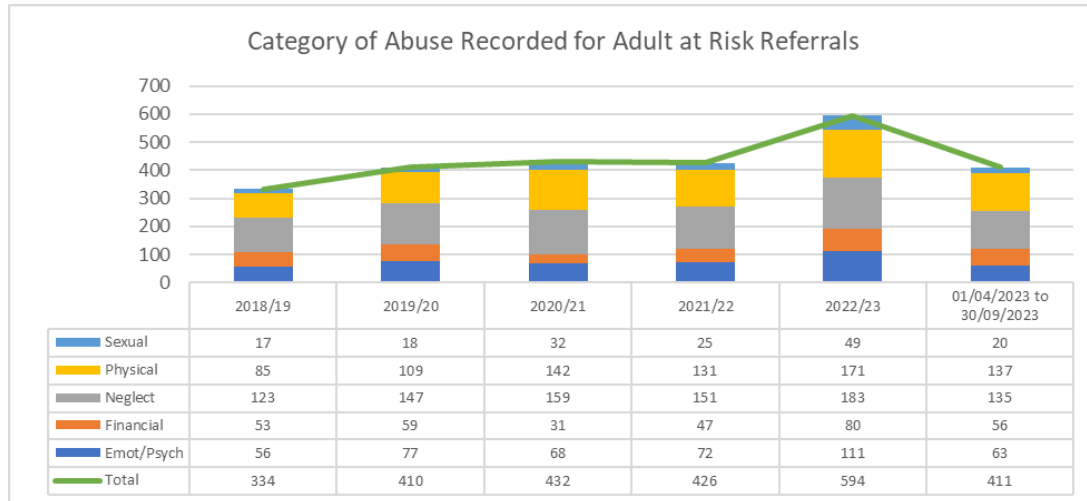
Some referrals are received where there is no abuse/neglect, but care needs are identified – these are then passed on to the Common Access Point which is the ‘front door’ of adult social care, providing information, advice and assistance and proportionate assessment of needs.

**Graph 1** below shows the categories of abuse recorded on adult at risk referrals between 1/10/2022 and 30/9/2023:



**Graph 1**

## Appendix 1

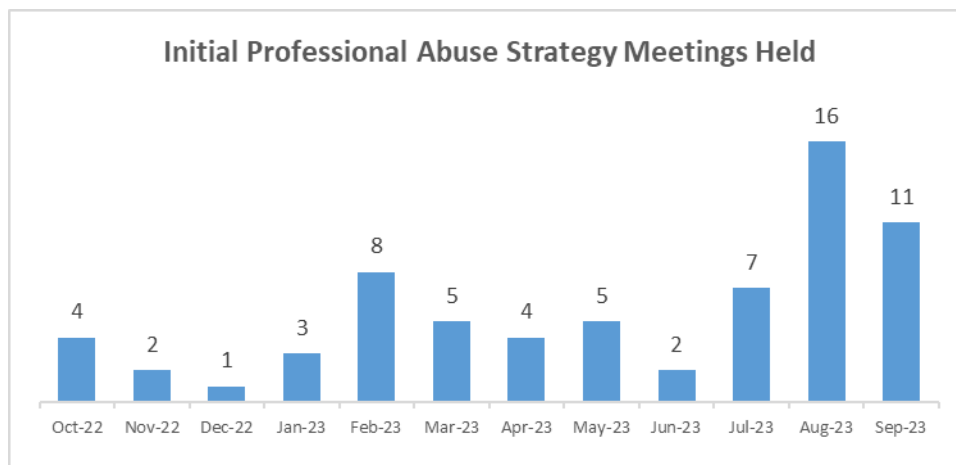


**Table 3**

Table 3 above shows the trend analysis for the categories of abuse recorded for adults at risk referrals over the previous 5-year period.

The Adult Safeguarding team joined Bridgend's Multi-Agency Safeguarding Hub (MASH) in July 2018. The MASH remained operational throughout the Covid-19 pandemic. The co-location of all teams in the MASH has allowed for instant information sharing between agencies which in turn results in a timelier, focused, response to safeguarding concerns. The Adult Safeguarding & Secure Estate Service Manager is also a representative on the joint MASH Quality Assurance Group, which is attended by colleagues from Bridgend MASH and Pontypridd MASH.

**Graph 2** shows the number of Initial Professional Concern strategy meetings held for those in positions of trust working with adults. The number of referrals between 1/10/2022 – 30/09/23 amount to 153 referrals where a total of 68 Initial Strategy meetings have been held.



**Graph 2**

## Appendix 1



**Graph 3**

Graph 3 shows the total number of initial professional abuse strategy meetings held over the previous five-year period, by year.

### **Deprivation of Liberty Safeguards (DoLS)**

The Mental Capacity Act 2005 provides a statutory framework for making decisions on behalf of individuals who lack mental capacity to do so for themselves. People can be deprived of their liberty wherever they live, but in broad terms this is divided between a Care Home/Hospital setting and a community setting.

On 6 April 2023 Local Authorities in Wales received a letter from Welsh Government stating, following the announcement by the UK Government that Liberty Protection Safeguards (LPS) would not be introduced in this parliament, and the Welsh Government cannot bring forward its own regulations to implement the LPS in Wales. The letter stated that there is a need to consider how to strengthen the current Deprivation of Liberty Safeguards (DoLS) system in Wales, and to continue to protect and promote the human rights of those people who lack mental capacity. Welsh Government remains committed to providing funding to protect the rights of those who lack mental capacity under the current DoLS system. Welsh Government will therefore continue to provide funding at a comparable level to 2022/23 levels, to ensure that these rights are protected ahead of any future implementation of the LPS.

In 2023-24, the Council received £133,392 grant funding from Welsh Government. The Council used part of the grant funding to employ an agency for a two-month period to assist to clear a small backlog of 150 cases leaving a total of 34 cases to allocate.

The data in **Table 4** below shows the numbers of DoLS referrals received into Bridgend adult services from 1/10/2022 to 30/09/2023:

	01/10/2022 to 30/09/2023
<b>Number of DoLS Referrals Received</b>	563

**Table 4**

Appendix 1

	2018/19	2019/20	2020/21	2021/22	2022/23	01/04/2023 to 30/09/2023
DoLS Referrals Received	545	518	515	393	562	262

**Table 5**

Table 5 indicates the number of Adult’s DoLS referrals received over the previous 5 year period, by year.

**Children Deprived of their Liberty.**

The data in **Table 6** below shows the numbers of DoLS referrals received into Bridgend children services from 1/03/23 to 30/09/2023. Data is not currently available for a 5-year comparison.

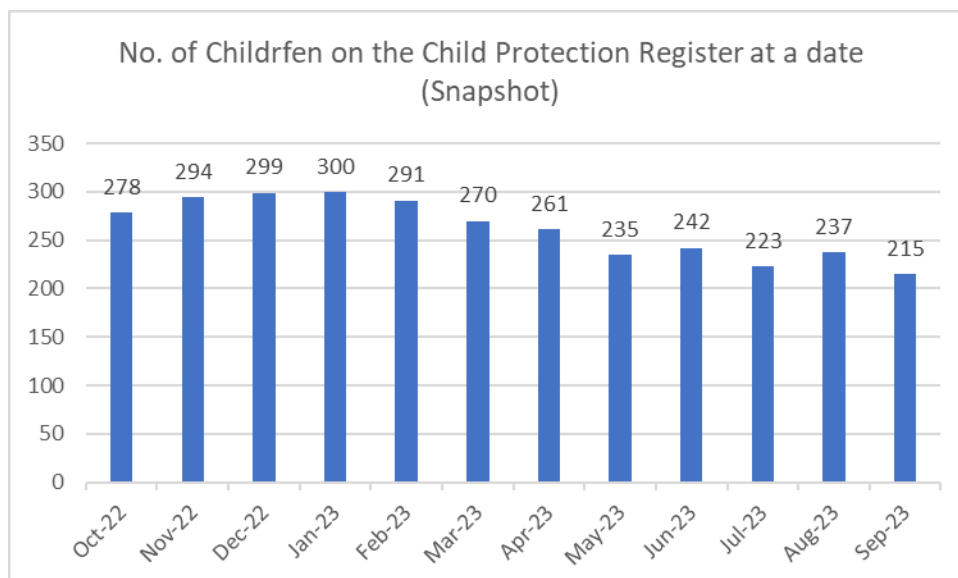
	01/03/23 to 30/09/23
Number of DoLS Referrals Received	8

**Table 6**

During the reporting period we have identified 8 cases where the Local Authority has applied for DoLS for looked after children in the 2 years up to 1<sup>st</sup> March 2023. Colleagues in Legal Services deal with DoLS applications as well and they also deal with any applications from the Childrens Disability and Transition Team for looked after children who are 16/17.

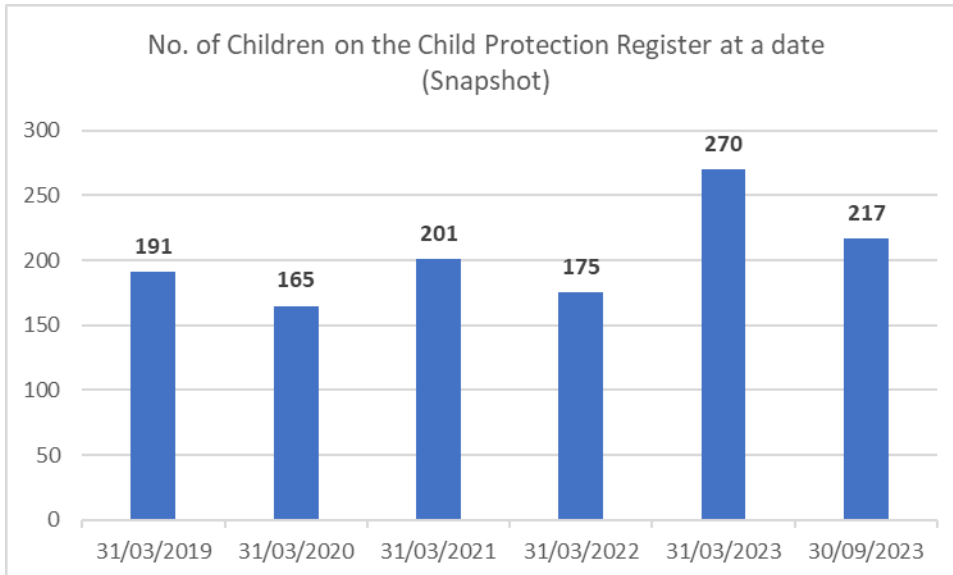
**Safeguarding children**

The Child Protection Register (CPR) figures for this period are set out below in **Graph 4**:



**Graph 4**

## Appendix 1



**Graph 5**

Graph 5 shows a snapshot comparison of the number of children on the Child Protection Register over the previous 5-year period by year.

**Table 7** below shows the categories and ages of the children open to the Child Protection Register as of the 30/09/23.

Category of Abuse	Age Group					Total
	Under 1	1-4	5-9	10-15	16-18	
Emotional Abuse	3	10	24	17	0	54
Neglect	6	9	14	16	4	49
Neglect and Physical Abuse	2	8	12	13	0	35
Neglect and sexual abuse	0	2	0	4	1	7
Neglect, Physical and Sexual Abuse	0	0	0	1	0	1
Physical abuse	3	21	13	18	2	57
Physical and Sexual Abuse	0	0	0	3	0	3
Physical and Sexual Abuse and Financial Abuse	0	0	0	2	0	2
Sexual abuse	0	3	1	5	0	9
<b>Total</b>	<b>14</b>	<b>53</b>	<b>64</b>	<b>79</b>	<b>7</b>	<b>217</b>

**Table 7**

Category of Abuse	31/03/2019	31/03/2020	31/03/2021	31/03/2022	31/03/2023	30/09/2023
Emotional Abuse	82	62	64	54	84	54
Neglect	66	73	87	56	62	49
Neglect and financial abuse	3	0	0	0	0	0
Neglect and Physical Abuse	15	14	16	14	39	35
Neglect and sexual abuse	8	6	0	0	5	7
Neglect, Physical & Financial Abuse	0	0	0	2	0	0
Neglect, Physical and Sexual Abuse	0	2	0	2	2	1
Physical abuse	5	4	20	42	62	57
Physical and Sexual Abuse	1	0	5	0	2	3
Physical and Sexual Abuse and Financial Abuse	0	0	0	0	0	2
Sexual abuse	11	4	9	5	14	9
<b>Total</b>	<b>191</b>	<b>165</b>	<b>200</b>	<b>175</b>	<b>270</b>	<b>217</b>

**Table 8**

Table 8 above shows the categories of abuse recorded at registration, compared to the age recorded for children open to the Child Protection Register over the previous 5-year period.

## Appendix 1

The numbers of children subject to the Child Protection Register is steadily declining during the reporting period. Targeted work has been undertaken to progress cases, including case consultation and improved management oversight to ensure drift does not occur. The category trends above follow the same trends as the previous year. Contributory factors for this are the rise of awareness of child protection factors in the media, the MASH strengthening processes which leads to greater numbers of assessments being undertaken, improved training and recognition of child abuse, covid-19 related social challenges and professional awareness of the importance of the duty to report following the tragic deaths of children in Bridgend. The current figures show a steady reduction in CPR figures.

The highest figure we have seen in BCBC of children subject to the CPR was in January 2023 with a figure of 306. Since this time we have seen improvements in our recruitment and retention rates which has created greater stability in our safeguarding locality hubs. As such targeted work has been undertaken with children and their families to reduce our CPR numbers. We have also strengthened management oversight processes which has assisted in less drift in cases. It is pleasing to see this steady reduction and we envisage this will continue.

The level of work has increased in the MASH and Information Advice and Assistance Service. **Table 9** below shows the distribution of this work for the past year to date.

Mash and IAA continue to work diligently to meet their statutory functions. The demands on this service have increased significantly in the last year, however the service is meeting its compliance targets.

<b>1st Oct 2022- to 30th Sept 2023</b>	<b>Total</b>
Number of Safeguarding Contacts	10539
No of new assessments completed	2495
No of strategy meetings held	2248
No of section 47s investigations	1678
No Initial child protection conferences	363
No of Review child Protection Conferences	792

**Table 9**

The number of referrals received in this period has increased by 4024, however our level of assessments has decreased by 179 as a result of improved screening and decision making. This figure also evidences an increase in referrals that do not meet the threshold for statutory services. As such we are undertaking workshops with safeguarding partners to agree a common threshold policy. This is currently in draft and consultation is taking place with Police and Health partners. Our rate of Section 47 Child Protection Investigations has increased by 457.



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	2018/19	2019/20	2020/21	2021/22	2022/23	01/04/2023 to 30/09/2023
Number of Safeguarding Contacts	7945	6810	4742	5667	8334	5788
No of new assessments completed	1712	1835	1042	1644	3114	1183
No of strategy meetings held	987	949	627	1086	2154	1166
No of section 47s investigations	786	746	515	865	1557	843
No Initial child protection conferences	238	240	214	201	406	181
No of Review child Protection Conferences	557	558	518	508	659	408

**Table 10**

Table 10 shows a breakdown of safeguarding referrals and subsequent required actions over the previous 5-year period.

The core business of the Council's Children's social care department is safeguarding and protection of children from harm. The Council approved a 3-year strategic plan in September 2023 to deliver sustainable improvements in outcomes for children and families. An excerpt from [Bridgend Children's Social Care Strategic Plan 2022-2025 Improving Outcomes for Children and Families in our County Borough](#) relating to safeguarding is as follows:

*This plan sets out Children's social care's purpose will have a clear purpose. This purpose will be achieved through culture and values which are inclusive and support everyone within the service and we the people we work with to feel part of the 'family firm'. Our culture will be open and transparent, celebrate our strengths and commit to learning and development and continuous improvement; High standards of safeguarding and child protection practice, recognizing that whilst safeguarding children is an inherently multi-agency endeavor children's social care play a leading role in ensuring Bridgend children are protected from harm.*

*Bridgend ensures to create a way of working which is 'proactive' rather than 'reactive', with interventions focused on preventing escalation of needs because needs are met effectively at the earliest opportunity, preventing the need for children and young people to become care experienced unless this is evidently the right outcome in which case plans for permanence and stability will be timely and support children to achieve their potential.*

### **Public Law Outline (PLO)**

The PLO is a legal process which was introduced in April 2014. The PLO sets out streamlined case management procedures for dealing with public law children's cases. The aim is to avoid care proceedings if possible and for those cases where proceedings are necessary, identify and focus on the key issues for the child, with the aim of making the best decisions for the child within the timetable set by the Court (26 weeks), and avoiding the need for unnecessary evidence or hearings. Under the PLO, the 'pre-proceedings process' is considered when the above has not been effective with a family and the legal threshold is met i.e., when the child/ren is suffering or is at risk of suffering significant harm.

This process is followed when the Local Authority has assessed that the risks are able to be managed safely whilst the children remain in the care of their parents/primary carers. The process allows the parents to obtain legal advice and a legal meeting takes place with the parents and lawyers. In this meeting the Authority sets out clearly its concerns, its plan to help the family, and the consequences if no progress is made. The process is set for a

## Appendix 1

realistic period of time for families to engage in the necessary services to ensure that the child/ren's needs are met and they are kept safe from harm.

In this reporting period 71 cases entered the PLO process.

### Care Proceedings

Issuing Care Proceedings is the last resort situation for the Local Authority and will only be issued when the Local Authority has attempted to do all it can to work with and support the family but there has been no change and the child/ren are suffering or are at risk of suffering significant harm should they remain in the care of parents or primary carers. In Bridgend there are currently 24 cases subject to proceedings.

### Cwm Taf Morgannwg Regional Safeguarding Board

The Cwm Taf Morgannwg Safeguarding Board (CTMRSB) is a statutory partnership comprising the agencies that are responsible for safeguarding children and adults at risk in the Cwm Taf Morgannwg area. The Board ensures that agencies in the region have effective arrangements in place to ensure that people of all ages, living in the region, are protected from abuse, neglect, or other kinds of harm. This also involves preventing abuse, neglect or other kinds of harm from happening.

The CTMRSB operates within the statutory guidance set out under Part 7 of the SSWBA. Membership of Safeguarding Boards is prescribed within the Act. The RSB is a multi-agency, statutory partnership whose main objective is to ensure that local safeguarding arrangements and partners act to help and protect vulnerable people at risk of abuse and neglect across the region.

The Safeguarding Board has published an Annual Report into its activities. The Annual Report for 2022-23 is accessible via the following link: [Annual report 2022/23](#)

The Board also publishes an outcome focused Annual Plan. The Annual Plan for 2023-2024 is in **Appendix 2** to this report. The Annual Plan for 2023/2024 is accessible via the following link: [Annual Plan 2023/2024](#)

There is a committee and sub-group structure sitting under the Board to support the delivery of the Annual Plan on behalf of the Board. Each Sub-group uses performance measures to report on a quarterly basis to the Board, via the Joint Operational Committee, and to escalate any risks and issues against the delivery of the plan and for decision and action from the Board. This enables the Board to take ownership of its work at strategic level and to provide leadership to subgroups.

The sub-groups of the Safeguarding Board are:

- Children's Quality Assurance Sub-group
- Adults Quality Assurance Sub-group

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- Joint Adult child Review Group
- Protocols and Procedures Group
- Training and Learning Group
- Engagement, Communications and Participation Group

The RSB is required to raise awareness with the public of the need to protect and prevent children, young people and adults from becoming at risk of abuse, neglect and other forms of harm, and provide information about how this can be achieved. As part of developing a positive culture of learning the Board also needs to ensure that information is widely disseminated within the workforce to inform them about best practice and learning arising from reviews, audits and other Board activities. The Board has an established group whose aim is to ensure that there are clear processes in place for the identification of engagement and participation needs and to capture the activities of partner agencies in meeting these needs.

### **Child and Adult Practice Reviews**

In 2013, Child Practice Reviews replaced what were known as Serious Case Reviews (SCRs). This process stems from the Care and Social Services Inspectorate Wales report published in October 2009 - *Improving Practice to Protect Children in Wales: An Examination of the Role of Serious Case Reviews*. This work was pivotal to where we are today and concluded that action was required to replace the SCR process which had become ineffective in improving practice and inter-agency working.

The overall purpose of reform of the review system is to promote a positive culture of multi-agency child protection learning and reviewing in local areas, for which the Cwm Taf Morgannwg Safeguarding Board and partner agencies hold responsibility.

The purpose of the review is to identify learning for future practice and involve practitioners, managers and senior officers in exploring the detail and context of agencies' work with the child(ren) and family. The review is intended to generate professional and organisational learning and promote improvement in future practice.

The following Child Practice Reviews were published between October 2022 and September 2023 relating to Bridgend children.

There are 4 Child Practice Reviews being undertaken in relation to Bridgend children that will be published during the next reporting period.

The themes from the Learning Events that have taken place have identified the need for strengthened processes for sharing information, the importance of embedding a quality assurance framework, further development of multiagency training and the need for the Local Authority to adopt a clear model of practice.

As a result, processes have been strengthened, including improved multiagency working practises, the involvement of fathers and extended family in child protection processes. A mandatory training program has been implemented with a focus on the importance of professional curiosity and recognising coercive controlling behaviours. Bridgend Children's Social Care has implemented the Signs of Safety Practice Model. A Supervision Policy has been embedded throughout the service and this is providing greater management oversight.

### **Signs of Safety implementation**

Following the agreement of the Organisational and Practice Goals aimed to be achieved through the implementation of Signs of Safety, by the Senior Management Team alongside the Signs of Safety Consultant, two Signs of Safety Launch days were held in March 2023. The aim of the launch days were to introduce Signs of Safety to the Children's Social Care Workforce and share the implementation plan alongside the Leadership Promise.

Following this, as part of the implementation plan, four workstreams were developed, these included System Alignment, Meaningful Measures, Leadership and Learning and Development.

Between April and July, initial two-day Signs of Safety training was provided to the frontline Social Care Workforce, which introduced them to the Risk Assessment structure and process along with the Next Steps. Following this, the Signs of Safety Consultant spent time with Childrens Social Care Teams, as part of practice intensive sessions focused on their individual team areas. Partner Agency briefings were also facilitated by the Signs of Safety Consultant. The consultant facilitated a session with the Joint Operational Group, which included partners from MASH, Education and Health. Quarterly partner agencies briefings have continued to be facilitated by the Principal Officer for Signs of Safety, who has also facilitated introduction briefings with the Designated Safeguarding Leads within Schools, Early Help services and Foster Carers.

As part of the System Alignment workstream, significant work is underway to embed Signs of Safety within all forms used by Children's Social Care on the Welsh Community Care Information System (WCCIS). This has required a whole system review and process mapping to ensure all forms are captured. Interim arrangements have been applied to support Childrens Social Care to able to begin using the skills and knowledge learnt on training while they await for WCCIS to be aligned. This will ensure consistent practice across teams and framework being embedded.

Enhanced five day training is now underway for those that have completed the initial two-day training to learn and understand how to use Signs of Safety to work with parents/carers and create family safety plans. Due to ongoing staff turnover and changes, the two-day and five-day training programs are continuing to be provided to ensure that all staff access this training.

The aim of the Meaningful Measures Workstream is to understand in a timely way, the progress being made with the implementation, to evidence our improvement and the good difference it makes for children and families so we can ensure improved service consistency, quality, and impact.

### **Adult Practice Reviews**

The RSB has completed one adult practice review for a Bridgend resident during the reporting period. Adult R (pseudonym) of this review had complex needs arising from past trauma, mental illness and poor physical health. The death was unexpected, and the review considered the multi-agency response to the circumstance and made recommendations for learning which will be monitored via the Cwm Taf Morgannwg Joint Practice Review subgroup.

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There is currently one new adult practice reviews for a Bridgend resident being undertaken by Cwm Taf Morgannwg Safeguarding Board.

Following a child or adult practice review, the learning is disseminated in several ways, including specific briefings for workforce. 7-minute briefings which summarise the learning are widely disseminated. The learning informs individual, team, service and organisational learning and development plans. Where necessary, policies, procedures and practice guidance are developed. Detailed action plans are developed which are robustly monitored through the RSB practice review sub-group.

### **Bridgend Safeguarding Partners Joint Operational Group**

In the last 2 years local safeguarding partnerships have been developed through the establishment of a Bridgend Safeguarding Partners Joint Operational Group (JOG) which is chaired by the Deputy Head of Children's Social Care and reports through the RSB.

The JOG was established at a time of increased demand and has continued to enable Bridgend safeguarding partners to exercise real time situational awareness of operational safeguarding performance across partner agencies to ensure children and adults are effectively safeguarded from risk and harm. The JOG also considers and agree actions to address, at a thematic level of operational escalations via the RSBs process to resolve professional differences (the CRISP process).

### **Bridgend Corporate Safeguarding Policy**

Safeguarding is the responsibility of all Council Directorates. With a view to promoting awareness of this and raising the profile of Safeguarding across the whole of the Council, the Corporate Safeguarding Policy has been reviewed, developed and reimplemented. This sets out the Council's duty and commitment to safeguard and promote the health, well-being and human rights of adults and children at risk and to ensure that effective practices are in place throughout the Council and its commissioned services such that individuals can live their life free from harm, abuse, and neglect. This policy has been updated to strengthen the approach to self-evaluation, management of risk and governance arrangements.

The Corporate Director of Social Services and Well-being chairs a monthly Corporate Safeguarding Group which includes representatives from across the Council. The group oversees a corporate safeguarding dashboard which includes information on safeguarding performance from all parts of the Council and which is reported to the Cabinet Corporate Management Board (CCMB).

### **Exploitation**

The Council is committed to provide a coordinated, multi-agency response to children, young people and vulnerable adults who are currently at risk, or likely to be at risk of, Child Sexual Exploitation, Child Criminal Exploitation, County Lines activity and gang affiliation. We aim to provide a range of services and forums whereby violence, vulnerabilities and exploitation is discussed and addressed from a multi-agency perspective.

To progress the multi-agency management of exploitation a panel has been established. The first full panel took place in June 2023. The impact of the exploitation screening tools,

## Appendix 1

and multi-agency collaboration is already evident. Two senior social workers have been appointed to lead on exploitation within Mash/IAA and the Locality Teams. The safeguarding exploitation senior social workers undertake a range of safety mapping tasks as well as developing the relationships between the multi-agency partners and in particular the development of the missing protocol and continues to support frontline practitioners in completing the exploitation screening tools.

Nearly all secondary schools have participated in the Exploitation Panel. As part of this a mapping exercise is being developed to identify potential links between and across young people schools in the county.

The number of young people presented to EPP Panel since June 2023 is 42. That includes 18 females and 24 males from the range 8-17. The nature of exploitation in these cases has included sexual exploitation, criminal exploitation, trafficking and periods of missing. Between 1 October 2022 and 30 September 2023 there were 121 criminal and sexual exploitation concerns for 82 children/young people.

### **Safeguarding in Education**

Within the Education and Family Support Directorate the Education Engagement Team (EET) was established in 2018 and its remit includes the 'safeguarding in education' role.

EET support children from groups identified by Estyn as being vulnerable or potentially vulnerable such as: excluded pupils, care-experienced children, those known to Youth Justice Services, those with English as an Additional Language and Home Educated Learners. This "joined up" approach means that the team are able to offer schools ongoing advice and guidance around a range of areas and have knowledge and skills in safeguarding, child protection as well as education. The EET team are co-located within the Multi-Agency Safeguarding Hub (MASH).

EET deliver Designated Safeguarding Lead training to schools. They facilitate whole school safeguarding training to individual schools and Flying Start provisions. Within the remit of EET they also facilitate and coordinate twice yearly Designated Lead Forums. These meetings are for both Designated Safeguarding Leads and Designated Leads for Looked After Children. The meetings cover regular safeguarding information and training sessions and speakers from partner agencies and internal teams. This year the forum has included speakers from Children's Services, Signs of Safety information, Fostering Wales and Police colleagues covering topics such as Care Experienced Children placements, updates on services in Bridgend, Child Practice Review 7-minute briefings and County Lines.

Schools in Bridgend continue to undertake audits of their safeguarding approaches. Utilising an audit tool developed by Estyn schools are able to satisfy themselves that their approaches to safeguarding are robust. All school audits are reviewed, and quality assured by EET annually. Findings from these audits have highlighted good practices and demonstrate schools have a good understanding of their safeguarding responsibilities. Areas for development have included the role of the school governing body in safeguarding and their understanding of their responsibilities for safeguarding issues within their school. Additional opportunities for governors to access safeguarding training have been offered this year to respond to this need.

## Appendix 1

To date for this academic Year 23-24, the Education Engagement Team have delivered 16 whole school Child Protection Training sessions as well as 1 Designated Lead Training session with 65 staff in attendance and 1 Designated Lead Forum with 45 school and Early Years staff in attendance.

The Current number of electively home educated learners is 214.

### School safeguarding audits

Welsh Government statutory guidance “Keeping Learners Safe” states clearly that the responsibilities of schools, governing bodies and local authorities, voluntary-aided and foundation schools, and further education institutions, under section 175 of the Education Act 2002 and independent schools under section 157 of the 2002 Act. The guidance states that all staff in those education settings must have an understanding of their responsibilities linked to safeguarding. Education settings must ensure that there are systems in place to support staff to understand and discharge these responsibilities effectively. The guidance also provides schools with an audit tool that can be used to evaluate their safeguarding approach and to assure themselves of their compliance in this key area.

In the Summer and Autumn term of 2022, schools were asked to complete this initial audit tool to consider how they are discharging their responsibilities linked to safeguarding. The local authority, specifically the education engagement team acted as a “critical friend” as part of this process and in subsequent years have supported schools via annual quality assurance visits during the Autumn Term.

### VAWDASV

**Table 11** sets out the referrals received by the Assia Domestic abuse service between September 2022 and October 2023. Due to changes in service provision, 5-year comparative data is unavailable.

September 2022 – October 2023	
Referrals received	2820
Referrals where support was accepted	2103
Referrals received for female victims	1325
Referrals received for male victims	310
Referrals received for non-binary victims	2

**Table 11**

During the period between September 2022 and October 2023, Assia Domestic Abuse Services received 2820 referrals, of these referrals 2103 accepted support. This means 561 referrals didn't accept support, some of these would have been repeat referrals and would have already been active within the service. All referrals would have been contacted directly, where contact was made, full safety planning would have been discussed but ongoing support would have been declined. Where contact was not directly made with the victim, a letter and safety plan would have been sent out where safe to do so. We would also let the referrer know of any outcome. 286 referrals were male, we are currently receiving higher numbers of male victims since having our dedicated male victim IDVA (Independent domestic violence advisors) which is a positive.

## Appendix 1

The VAWDASV Manager participates in child and adult practise reviews as well as DHRs (Domestic homicide reviews) as required. All of which ensure learning can be sought and shared. In the last year we have delivered training across the region on Coercive Control, Domestic abuse awareness and Exploitation. In addition to this we are continuing to raise awareness in the community with the Police, PCSOS, the Community Safety Partnership Team and Midwives.

As indicated above, we have recruited a dedicated older persons IDVA, we also have a dedicated Male Victim IDVA. In addition to this we also have a secondees from New Pathways who a role that offers SV (Sexual Violence) support work / stabilisation work to identified victims that need ongoing trauma work around the SV whilst the IDVA stays in situ to continue with the specialised DV work. The trauma from SV can often derail a victim from engagement with an IDVA so this stabilisation work should prove effective. We have a dedicated Substance use worker from BAROD working with High-risk victims of Domestic Abuse and perpetrators.

We have also developed a Male victim focus group to ascertain what is working well and where we can improve the service going forward, this is proving very popular with the victims and will hopefully develop more as the year progresses. We are currently going through a Leading Lights accreditation which is due to be assessed fully by the end of the financial year.

There are six objectives within the National Strategy that Bridgend also follows:

- Objective 1: Increase awareness and challenge attitudes of violence against women, domestic abuse and sexual violence across the Welsh Population
- Objective 2: Increased awareness in children and young people of the importance of safe, equal and healthy relationships and that abusive behaviour is always wrong
- Objective 3: Increased focus on holding perpetrators to account and provide opportunities to change their behaviour based around victim safety
- Objective 4: Make early intervention and prevention a priority
- Objective 5: Relevant professionals are trained to provide effective, timely and appropriate responses to victims and survivors
- Objective 6: Provide victims with equal access to appropriately resourced, high quality, needs led, strength based, gender responsive services across Wales

### **Partnership and community safety**

Bridgend Community Safety Partnership (CSP) involves various agencies from the public, private and voluntary sector that work together to reduce crime, disorder and fear of crime locally, in order to improve the quality of life and to create a safer living and working environment.

Following the implementation of the Well-being of Future Generations Act (Wales) 2015, the decision was taken by Bridgend Public Services Board (PSB) to embed the activities of the Bridgend CSP into its own, and this practice continues now that the PSB has merged with Cwm Taf PSB to create one public services board for Cwm Taf Morgannwg. The two current CSPs operating in the region have also stated their intention to merge and have gone through an external review to scope the required work. The remainder of this financial year will see a task and finish group take forward the recommendations from this review with a view to being one merged CSP in spring 2024.



## Appendix 1

Statutory membership for the CSP includes Bridgend County Borough Council, South Wales Police, South Wales Fire and Rescue Service, Cwm Taf Morgannwg Health Board and National Probation Service. Other partners have chosen to be involved, including the Police and Crime Commissioner, Cwm Taf Morgannwg Safeguarding Board, registered social landlords, Department of Work and Pensions and Bridgend Association of Voluntary Organisations (BAVO).

This has been a busy year for the CSP. Key areas of work have been around delivering the Safer Streets Home Office grant which was secured in partnership with South Wales Police. The focus for cycle four of the grant was on improving feelings of community safety and reducing violence against women and girls, and the Council utilised the 'Safer Streets' fund to carry out a broad scope of activity employ health and well-being co-ordinators, undertake youth diversionary activities, work with Welsh Women's Aid to deliver 'Don't be a bystander' training and work with Valleys to Coast to undertake visual improvements.

The biggest area of spend was providing improved CCTV coverage across the county borough. New cameras were installed in key locations as a measure of improving feelings of community safety particularly for women and girls, reducing the risk of crime and addressing ASB concerns.

One of the most successful areas of spend for this grant was in the 'Street Art' project which saw areas across the County Borough be transformed from unwelcoming spaces often featuring hateful or discriminatory messages into bright, vibrant areas for communities and improve feelings of safety. The street artists worked with local groups to transform underpasses, subways and walls and drew on local inspiration to give each project a distinct identity, such as the Mari Lwyd design near Maesteg Bus Station and the aquarium in Porthcawl. The community response to these has been very positive, both in person and social media. South Wales Police delivered elements of the Safer Streets grant, with activities that complemented those being delivered by the Council, such as target hardening, developing new Neighbourhood Watch schemes and also very popular self-defence classes specifically for women and girls aged over 16 living in Bridgend County Borough. These were held at a variety of locations to ensure more women were able to attend.

The funding for 'Safer Streets' came to an end in September 2023. Round five of the grant is awarded on a regional basis, i.e. to Cwm Taf Morgannwg, and the Community Safety Manager for South Wales Police has led on the application. The amount available is significantly lower than received in round four but remains focused on improving feelings of safety, particularly for women and girls.

Anti-Social Behaviour town centre management groups for Maesteg and Bridgend have resumed to act as a multi-agency problem solving fora for these areas. Attendance is from a broad range of partners and there is a good level of engagement. Reports of ASB are generally reducing which is positive, but we continue to encourage communities and residents to report their concerns to the Police through online reporting, email and 101. Our activities are undertaken using ASB as an evidence base, so this reporting is vital for us understanding and addressing the challenges seen in our communities and supporting these communities to feel safe and inclusive.

Acquisitive crime continues to be a challenge, and likely linked to the cost-of-living crisis. Bridgend's Community Cohesion officer is currently seconded to Swansea and acting as the Regional Community Cohesion Coordinator. Whilst the post is currently vacant, we are

## Appendix 1

still actively working to create and improve feelings of cohesion. One of the ways we are working innovatively is through our SMART partnership with Welsh Government and Swansea University to develop an app that can capture and report hateful images and graffiti. 'StreetSnap' is being developed and piloted in Bridgend and has already generated significant interest and is identified in the Crime and Justice element of the Anti-Racist Wales Action Plan as good practice. We will soon be establishing focus groups and carrying out training with staff to refine and test the app.

### **Workforce**

Human Resources provide workforce information to the Council's Safeguarding Board which meets monthly. The information includes a monthly update on the status of DBS checks (in particular renewals) and quarterly updates on numbers of completed safeguarding training. If any follow up action is deemed necessary, then this is agreed at the meeting and the relevant managers will be asked to take this forward. Reports on DBS end dates and outstanding safeguarding training are sent to managers periodically to enable them to take relevant action. There is a current DBS Policy and Recruitment & Selection Protocol in place to advise managers on the steps to follow when undertaking a recruitment exercise. All managers are expected to complete the recruitment & selection e-learning module prior to participating in this process.

### **Housing**

From October 2022 to October 2023 there were over 1800 homelessness applications with 989 individuals, including 280 children placed into temporary accommodation. Housing and homelessness services are under unprecedented demand. A draft Housing Support Programme Strategy for 2022-2026 has set the Council's priorities for tackling these demands. The draft strategy has been subject to public consultation and the final version of the strategy will be submitted to Cabinet for approval prior to submission to Welsh Government. Joint working through BCBC's Corporate Safeguarding Board and Corporate Parenting Board ensures a link between housing and social services. Actions from these groups are looking to further analyse the circumstances in which individuals, including care leavers have found themselves homeless, with the aim that further preventative measures can be put in place in the future.

### **Out of country placements and Operating Without Registration (OWRs)**

Out of County Placements are placements for care experienced children that are outside of the Bridgend area. There are times where Children's needs require that they are placed out of the local area, these can be related to managing risks for the young person or can be related to the need for specialist support that can only be provided out of area. In other cases, children can be placed out of county where there is no local provision available to meet the child's needs at that time. In these cases, efforts are made to support a child to return to the local area via ongoing searches by the placements team. Decisions to move children between placements are carefully made, balancing the current and anticipated future needs of children together with the requirement to provide local placements where possible.

In accordance with The Care Planning, Placement and Case Review (Wales) Regulations 2015, a local authority may only place a child out of county where they are satisfied there is no placement capable of meeting the child's needs within the county. A regular Out of

## Appendix 1

Authority Panel takes place to review cases where children are placed out of area in residential and high-cost placements. Panel is made up of representatives who can assist with meeting Childrens' needs in out of county arrangements, such as Health and Education.

01/10/22 – 30/09/23	
Placements out of Bridgend but in Wales	88
Placements outside of Wales	15

**Table 12**

41 children placed out of county currently are residing in Foster Wales Bridgend placements with General and Connected Persons carers. 17 of these children are placed with their parents. 21 are placed with independent fostering providers. The remaining children are placed with residential providers including parent and child assessment units.

### **OWR's**

OWR as an acronym for Operating Without Registration. This specifically refers to placements that are made where the provider is not registered with Care Inspectorate Wales in accordance with legislation. There have been 16 OWR's between 01/09/2022 and 31/10/2023.

Local authorities place children within such arrangements when there is an overriding need for a placement and where there are no other options available. Such considerations are subject to the highest levels of scrutiny and can only be agreed by the Director of Social Services and Wellbeing or the Head of Childrens Services in their absence. In all cases the Care Inspectorate is notified of the placement and regular updates provided evidencing the additional oversight in place to support the child and continued search activity of the Placement Team to secure a registered provision. These arrangements can vary:

- In some cases, the local authority places children with a provider who is in the process of setting up a new residential home but has not secured registration at the point this is needed.
- In others, a child can be placed with a Supported Living provider, a home for children aged 16+ who have support needs but with an additional package to meet any identified care needs of the child/ren.
- A child may also be placed in a home that is rented by the local authority with the support of a staff team recruited from an agency and/or supported by local authority staff.

The reasons for OWR's are related to overall placement sufficiency, the children's social care market study final report Wales summary (10 March 2022) found there are significant problems in how the placements market is functioning, particularly in England and Wales. The study outlined that there is a lack of placements of the right kind, in the right places, means that children are not consistently getting access to care and accommodation that meets their needs.

Within BCBC we have sought to address these issues via:

## Appendix 1

- Increases to Fostering Allowances above Welsh Government National Minimum levels
- Targeted foster carer recruitment activities Provision of paid respite for Foster Carers and the implementation of a Foster Friendly Policy within the Local Authority to enhance support to foster carers within BCBC.
- Developing and completing a new single occupancy provision within Bridgend that is registered with Care Inspectorate Wales (CIW).
- Developing and completing a new Residential Home that has 3 emergency beds and 4 assessment beds. The needs profiles of children within our existing medium term Residential Home have been reviewed to enable maximum occupancy.
- Securing funding to enable the commission of a specialist placement support service for children within both fostering and residential placements.

The local authority currently has 3 OWR placements.

	2018-19	2019-20	2020-21	2021-22	2022-23
Number of children	6	3	0	0	7
Number of placements	9	5	0	0	7

**Table 13**

Table 13 indicates the number of children and number of placements that utilised an OWR over the past 5-year period. It is possible for a child to have been placed in multiple OWR placements.

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>16 JANUARY 2024</b>
<b>Report Title:</b>	<b>SOCIAL SERVICES AND WELLBEING DIRECTORATE POLICIES – FOSTER WALES BRIDGEND FOSTER CARER RECORDING POLICY, AND FOSTER WALES BRIDGEND FINANCES POLICY</b>
<b>Report Owner / Corporate Director:</b>	<b>CORPORATE DIRECTOR SOCIAL SERVICES AND WELLBEING</b>
<b>Responsible Officer:</b>	<b>JOE BOYLE POLICY OFFICER – SOCIAL SERVICES AND WELLBEING</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the policy framework or procedure rules</b>
<b>Executive Summary:</b>	<b>This report outlines the process undertaken to develop the reviewed Foster Wales Bridgend Finances Policy and to develop and create the new Foster Wales Bridgend Foster Carer Recording Policy.</b>

## 1. Purpose of Report

- 1.1 The purpose of this report is to seek Cabinet approval of the Foster Wales Bridgend Finances policy (**Appendix 1**) and the Foster Wales Bridgend Foster Carer Recording Policy (**Appendix 2**) in order to support service provision in Bridgend County Borough Council's Fostering Service (Foster Wales Bridgend).

## 2. Background

- 2.1 It is a regulatory requirement under The Local Authority Fostering Services (Wales) Regulations 2018, and its associated Code of Practice for Local Authority Fostering Services 2019, to have policies in place relating to Finances and also Recording for Foster Carers.

## 3. Current situation / proposal

- 3.1 For both policies, relevant members of the Social Services and Wellbeing directorate were engaged and provided support in the drafting of the policy content for each aspect of the fostering service.

- 3.2 The new Foster Wales Bridgend Foster Carer Recording policy has been developed to provide Foster Carers with an understanding relating to the importance of recording, along with outlining what recording is required of them, and how and where to store their records.
- 3.3 As per regulation 37 of the Code of Practice for Local Authority Fostering Services 2019, the local authority has a requirement to have a policy which details the records that are to be maintained by the Council as the provider, on both children in foster care, and foster carers themselves; the daily records that the foster carer must maintain on the foster child placed with them; and the timescales for which records must be maintained within.
- 3.4 All local authority fostering services are required to have a Finances policy. This policy has been in place since August 2022, but has been reviewed and revised in order to reflect the change in timescales for the completion of Form F assessments, the revised process to ensure regular respite breaks are taken, and for complex needs allowance decisions to be made by the team manager, rather than through the Accommodation and Permanence Panel.
- 3.5 The Finances policy has been revised to remove the specific figures relating to allowance amounts. This is because the Welsh Government review and set an increased allowance for Foster Carers each year, and so this change ensures that the policy does not become outdated due to these annual rises. The figures for Foster Carer allowances from Bridgend have been included on the Foster Wales Bridgend webpages, with links included in the policy. In 2022 Cabinet approved a recommendation to allow BCBC to exceed the allowance rates set by Welsh Government to look to increase recruitment and retention rates of Foster Carers.

**4. Equality implications (including Socio-economic Duty and Welsh Language)**

- 4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on these policies.

**5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

- 5.1 The Act provides the basis for driving a different kind of public service in Wales, with 5 ways of working to guide how public services should work to deliver for people. The following is a summary to show how the 5 ways of working to achieve the well-being goals have been used to formulate the recommendations within this report.

Involvement	These policies have been informed by the review of relevant legislation and guidance, along with meetings and discussions with relevant members for the two policies.
Long term	These policies provide Foster Carers with an understanding of what allowance they will receive and how it is paid which aims to secure the services of Foster Carers in Bridgend. The

	Recording policy supports this by ensuring they are aware of what, how and where to record.
Prevention	The policies set out to prevent poor recording standards relating to Foster Carer recording, along with preventing a loss of Foster Carers for financial reasons.
Integration	These policies will be integrated into the Social Service and Wellbeing Directorate's Foster Wales Bridgend Fostering Service.
Collaboration	These policies have been developed collaboratively by working groups involving staff from across the Social Services and Wellbeing directorate.

## 6. Climate Change Implications

- 6.1 There is no direct impact on Climate Change through the implementation of these policies.

## 7. Safeguarding and Corporate Parent Implications

- 7.1 These policies will enhance the Council's ability to discharge its statutory duties under the Social Services and Well-being (Wales) Act 2014, and relevant regulations associated with The Local Authority Fostering Services (Wales) Regulations 2018 and the associated Code of Practice.

## 8. Financial Implications

- 8.1 Each year Welsh Government set the minimum allowance levels to be paid to Foster Carers. Bridgend County Borough Council (BCBC) has committed to paying that minimum level. Given that this allowance minimum rate is reviewed each year by the Welsh Government, this will have an ongoing impact upon budgets set by the Council for this area as there is no additional funding provided by Welsh Government relating to this allowance. The Cabinet Member for Social Services has the delegated authority under the Scheme of Delegation of Functions to approve any adjustments in the levels of grants, fees and allowances for Children and Young People and their carers in respect of Children's Foster Care.
- 8.2 In addition to this, the Reward Scheme relating to the "Refer a Friend" process has changed to an app-based system. Previously the scheme has rewarded Foster Carers with a £250 payment per successful referral, however an app-based system has now been adopted that manages the referral scheme as highlighted within section 5.21 of the policy. This app enables the referrer to receive points at each stage of the process which can then be cashed in for up to a maximum value of £500. The financial impact of the rewards upon the budgets set for this service area would be balanced against the positive financial impact of recruiting additional in house foster carers.

## 9. Recommendation

- 9.1 It is recommended that Cabinet consider and approve the reviewed Foster Wales Bridgend Financial policy at **Appendix 1**, and the new Foster Wales Bridgend Foster Carer Recording policy at **Appendix 2**.

## **Background documents**

None



**Bridgend County Borough Council**  
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr



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# **Foster Wales Bridgend Financial Policy December 2023**

Social Services and Wellbeing Directorate

<b>Updates, Revisions and Amendments</b>		
<b>Version</b>	<b>Details of Change</b>	<b>Date</b>
<b>2</b>	Updated policy to reflect agreement for paid respite provision for 2 weeks and overall increase in allowances by 7% in Cabinet 19.07.22	01.08.22
<b>3</b>	Updated Policy to reflect agreement for additional 5.5% increase in allowances 5 <sup>th</sup> April 2023 and reflect timescales for eligibility Form F assessments	12.04.23
<b>4</b>	Update policy to reflect revised process for regular respite and complex needs allowance decisions by the Team Manager rather than via Accommodation and Permanence Panel.	23.10.23
<b>5</b>	Removal of specific financial figures contained within policy so not to negate and outdate the policy when new allowances are announced by Welsh Government	13.12.23

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## **1. Introduction**

This policy aims to provide a clear and comprehensive summary of what payments are made to persons approved by Bridgend County Borough Council as foster carers as defined within this policy below.

This policy applies to all foster carers approved in accordance with regulation 8 of the Fostering Panels (Establishment and Functions) (Wales) Regulations 2018. It applies to all approved foster carers whether they are related to the child(ren) placed with them. It applies to long term and short-term placements with approved foster carers.

This policy applies to the payment of allowances and enhanced allowances (otherwise known as fees). An allowance is a weekly fostering allowance which is designed to cover the cost of caring for a fostered child. Allowances vary according to the age and needs of the fostered child. All approved foster carers receive at least the National Minimum Allowance. Enhanced allowances are sometimes known as fees. They may be paid in addition to an allowance to recognise a foster carer's time, skill and experience. The Enhanced allowance is paid to those that meet the eligibility criteria set out in this policy. Not all approved foster carers will meet the eligibility criteria.

## **2. Legal and Regulatory Framework**

In the formulation of this policy, the Council has considered case law decisions, the applicable legislation and statutory guidance including:

- Social Services and Well-being (Wales) Act 2014
- Fostering Services (Wales) Regulations 2003
- The Care Planning, Placement and Case Review (Wales) Regulations 2015
- Code of Practice to Part 6 of the Social Services and Well-being (Wales) Act 2014
- The Local Authority Fostering Services (Wales) Regulations 2018
- Fostering Panels (Establishment and Functions) (Wales) Regulations 2018
- R(X) v London Borough of Tower Hamlets [2013] EWHC 480 (Admin); [2013] EWCA Civ 904.

## **3. Definitions**

### **Foster Carer**

A foster carer is a person approved as a foster parent in accordance with the Fostering Services (Wales) Regulations 2003 or the Fostering Panels (Establishment and Functions) (Wales) Regulations 2018. For clarity this refers to both unrelated and related approved foster carers.

## 4. Key Principles

- 4.1 This policy is to apply equally to all foster carers, approved by a fostering service in Wales, who are approved under the Fostering Services (Wales) Regulations 2003 or Fostering Panels (Establishment and Functions) (Wales) Regulations 2018.
- 4.2 All approved foster carers will receive an allowance payment which covers the cost of caring for each child within their care. That allowance will be at least the National Minimum Fostering Allowance recommended by Welsh Government.
- 4.3 All approved foster carers will be entitled to an enhanced allowance (formerly fee) provided that they meet the eligibility criteria set out below. It is open to all approved foster carers, if they so wish, to be assessed against the eligibility criteria. The eligibility criteria has been set in relation to specific fostering tasks. It is open to all foster carers if they so wish to undertake the tasks to meet all of the eligibility criteria and to be assessed against those criteria.
- 4.4 Regulation 8 of The Fostering Panels (Establishment and Functions) (Wales) Regulations 2018 require the approving agency (Bridgend County Borough Council) to enter into a written agreement with a Foster Carer at the time of their approval and following each annual review of their approval.
- 4.5 All foster carers approved under Regulation 8 will be allocated a supervising social worker who will make contact with them on at least a once-a-month basis and will be able to assist in any matters relating to all payments while a child is in placement.
- 4.6 All payments will be made by BACS electronic transfer within two weeks of placement and thereafter on a weekly basis.
- 4.7 Any one-off payments incurred by the foster carer can be reimbursed via their supervising social worker subject to the proper approval and authorisation process. Guidance for this can be found on the Social Services and Wellbeing Fostering Intranet pages.
- 4.8 Basic Allowance payments are non-taxable and are specifically for the needs of the child in placement.
- 4.9 Enhanced Allowance payments are taxable at a rate determined on an annual basis by Her Majesty's Revenue and Customs (HMRC).
- 4.10 Foster Carers will be consulted prior to any major changes to the payment scheme.
- 4.11 All payments will be reviewed on an annual basis or more often should circumstances require. Examples of this include receiving updates from Welsh Government outside of the annual notification.

## 5. Payment Scheme

In Wales, the Welsh Government has introduced National Minimum Fostering Allowance for foster carers to cover the cost of caring for a child in their home and there is an annual increase on 1st April every year. All foster carers fostering for Bridgend County Borough Council will receive this allowance, details of which can be found on the Foster Wales Bridgend [webpage](#). In addition, foster carers for Bridgend County Borough Council may also receive an Enhanced Allowance (formerly fee) if they are able to demonstrate that they meet the Eligibility Criteria set out within this Policy and is a reflection of the skills, abilities and any additional tasks that the carer may be asked to undertake, such as assisting with training and recruitment.

### 5.1 Eligibility for an Enhanced Allowance

5.1.1 In order to receive the enhanced allowance all approved foster carers must be able to demonstrate all of the following:

- a) The required skills, ability and competence to care for the range of children a local authority may need to look after.
- b) A commitment to continued individual professional learning, development of their fostering skills and reflection on practice. They must have attended at least 2 training sessions organised or approved by the local authority in any one year and engaged in regular supervision;
- c) A commitment to co-production with the fostering service through active participation in foster carer support groups, consultation events, the recruitment of new foster carers and the provision of peer support.

5.1.2 All approved foster carers will be given the opportunity, if they so wished, to be assessed against the eligibility training during the Form F assessment or at the beginning of the placement for which the allowance is to be paid and thereafter at each annual review.

5.1.3 All approved foster carers will be given the opportunity, if they so wish, to attend on training courses etc. and to participate in co-production with the fostering service, if they so wish.

### 5.2 Process

An allowance eligibility flowchart to demonstrate the process that must be followed for each applicant enquiring to foster is included in this policy framework and can be found at **Appendix 1**. An enhanced allowance assessment has been designed to ensure consistent approach and delivery and can be found at **Appendix 2**.

Following the eligibility assessment being agreed the applicant will then undergo a Form F assessment to be presented to Panel. Every effort will be made the complete

the Form F at the earliest opportunity, however the timescale for a Form F assessment to be completed and presented at Panel is 4-6 months.

### **5.3 Payment of the enhanced allowance**

Payment of the enhanced allowance will commence from the date of recommendation of approval at foster panel following the presentation of the full Form F assessment and ratification by the Agency Decision Maker. The Agency Decision Maker is the Head of Children's Services or their nominated individual with delegated power as set out in the Foster Wales Bridgend Statement of Purpose.

### **5.4 Agency Carers transferring to Bridgend County Borough Council with a child in placement**

Carers currently approved by other agencies who have a Bridgend County Borough Council (BCBC) child (ren) placed in their care will continue to receive the current rate of allowance as contracted with their agency for the length of the placement(s) of the child (ren) in placement at the time of transfer.

### **5.5 Caring for children with disabilities**

Foster carers for children with disabilities receive allowances at the appropriate rates using the same criteria as applied for carers who look after non-disabled children.

Family Link Carers offer family-based short break care to disabled children and young people and are paid session payments.

The sessions are made up of 6-hour blocks and carers are paid for each block. A carer will receive payment for a full session where they provide care for between 0-6hrs. Where a carer provides care for 7-12hrs they will receive payment for two sessions and if they provided care for 24 hours this would be 4 sessions etc.

(Note there is no enhancement to the session payments for providing overnight stays).

The Family Link Carer will additionally receive a one-off 'Household Amenity Payment' only if they provide link care for a child that week. Should carers provide link care for more than 1 child in any given week, they will continue to receive the session payments for each child but only 1 Household Amenity Payment.

Foster Carers who look after children with disabilities full time, may be entitled to receive Disability Living Allowance (DLA) in addition to their fostering allowances. Supervising Social Workers should ensure that all foster carers are assisted in making a claim for DLA to the Benefits Agency. The Foster Carer will be responsible for the DLA and should take steps to ensure they can provide evidence of how this money is spent. It is strongly advised that the money be placed in a separate bank account and that the carer keeps a record of what the money has been spent on and ensures that statements are available to be viewed by the Supervising Social Worker, if required.

## 5.6 Transitional Foster Carers

Transitional Foster Carers provide a therapeutic fostering placement to a young person aged 0-18 years old for a maximum period of 24 – 36 weeks with the aim of developing a supportive relationship to enable the young person to move onto a long-term foster placement and/or return to birth family. Any approved foster carer can ask to be assessed as a Transitional Foster Carer.

Transitional carers will receive an enhanced allowance whether or not they have a child in placement in order to retain transitional foster carers and in recognition of the expectations that transitional carers have:

- The skills required to support complex placements.
- A willingness to provide support to their peers and provide respite placements.

When a child is in placement the transitional carer will also receive the age-related fostering allowance for that child.

Where a child is matched to a transitional carer, payments can commence at the point a transition plan to the placement is agreed. This will enable the foster carer to be available for suitable introductions to be made as part of a therapeutically informed transition plan.

## 5.7 Parent and Child Placements

In undertaking parent and child fostering foster carers will be paid a weekly allowance for 1 parent placements where the parent is not in receipt of benefits. Where a parent is in receipt of benefits this will be deducted from the weekly fostering allowance. Breakdown of the allowance can be found on the Foster Wales Bridgend [website](#).

At the outset of placement, the parent should come with 'caring materials' from their Maternity Grant such as buggy, sterilising unit, and cot. The Maternity Benefit Payment must be used for obtaining necessary items for a baby and not for general living expenses. The parent's social worker can advise and support if there has been difficulty in obtaining the Maternity Benefit.

Parent & child foster carer needs to pay from the care payment part of their weekly fostering allowance to the parent s/he is supervising having regards for the following:

- The payment of an allowance to the parent is an important part of the support and supervision of the parent & baby placement by the foster carer. This financial support significantly aids the overall aims of such placements, of avoiding the need to separate a mother from her new-born child, assessing the potential of the parent to care permanently for their child (or not) and helping them move onto more independent living.
- Having an allowance is good for the parent in placement. It helps to give a sense of independence, a measure of choice in making decisions about

how money is spent, an understanding of the value of money and helps to develop budgetary skills.

The amount to be paid to the parent must be clarified at the outset of the placement and explicitly addressed within the placement plan and at the initial placement set-up meeting. The rate of allowance should be kept under review by all concerned.

At the initial placement set-up meeting it must be explicitly clarified what the foster carer will be responsible for providing for, and with, the parent in terms of physical care such as meals, heating, use of washing machine etc. If in receipt of Income Support, the parent will have income to cover her/his own personal expenses.

If the parent leaves the placement and the child remains, the carer will revert to the appropriate payment for a child of that age.

If the parent is looked after and remains in the placement and the child moves the carer will revert to the appropriate payment for a child of that age.

### **5.8 When I am Ready**

The When I am Ready (WIR) provider will also need to sign an Excluded Licence Agreement along with the Young Person. They will receive the following payments as part of the WIR arrangement:-

- Rent from the young person (usually through Housing Benefit)
- Contribution to household costs from the young person
- A WIR Support Allowance paid by the Local Authority

The 'WIR' Support Allowance paid to the Provider is exclusively for the practical and emotional package of support that is being provided by them. Unlike the fostering allowance previously paid to the foster carer, it does not include any element to be given to or spent on the young person such as personal items, clothing, travel, holiday allowances and costs associated with birthdays, Christmas or other religious festivals.

The 'WIR' Support Allowance is exclusive of the contribution to Household Costs paid by the young person to the WIR Provider. It is also exclusive of Rent which will be paid direct to the WIR Provider.

For full details regarding how a person's household contributions are calculated please refer to the "When I am Ready Scheme' – Financial Arrangements Policy"

### **5.9 Supported Lodgings**

Each Supported Lodgings provider will receive a weekly allowance via BACS payment. This will be paid whilst there is a young person in placement, however BCBC do not offer a retainer, there will be no payment whilst the supported lodgings provider is vacant.



In terms of contribution to household costs, each young person will be expected to claim housing benefit and start the application process from the age of 18 years old. This will be an individualised amount for each young person. The young person will be expected to contribute to housing costs with 80% of this benefit once in receipt of it.

This is with the view of encouraging independence, and preparing the young person to live independently once they transition from the Supported Lodgings placement into independent living.

The remaining 20% of the housing benefit will be for the young person to use towards living costs, such as furniture, decoration, television etc.

The local authority will then decrease their payment to the Supported Lodgings provider by the amount they will receive from the young person via the housing benefit.

### **5.10 Initial Clothing Allowance**

This allowance is to be paid only in those situations where children are placed in a foster home without adequate basic clothing in line with the amounts set and agreed each year.

- When a child is placed without adequate basic clothing, the foster carer should discuss with their supervising worker what clothing will be required in order to meet the child's basic needs for the first month of placement. An initial payment can then be requested to ensure the carer is able to purchase basic clothing for the child/ children.
- Following this, carers would be expected to purchase replacement clothing from the allowances they receive for a child.
- Initial clothing can only be paid during the first 6 months of placement.
- If when a child is placed they do not have the required school uniform, the carers can make a separate request for payment for school uniform.
- Receipts should be obtained and given to the supervising social worker, who will pass these to the fostering manager. The money will be reimbursed in the next payment.
- The emergency clothing grant is only payable for new placements not for changes of placement.

### **5.11 Payments to all carers regardless of approval status**

None of the above payments for foster carers cover:

- Costs in relation to leisure, therapy or specific tasks in relation to rehabilitation, preparation for permanence or independence, which are identified in the placement plan, care plan or at childcare review and which are specific to that plan and significantly more expensive than ordinary family activities.
- Costs in relation to mileage in relation to the child for facilitating contact, transporting a child to school out of the local areas, or the foster carer's

attendance at meetings in relation to the child, or training for the carer. This will be paid at the Council Mileage rate.

- Costs in relation to loss or damage caused by a foster child/legal liability in respect of a claim by a foster child or member of their family as the Council has a separate insurance policy for this purpose. Foster Carers will follow the details and requirements as set out by this insurance policy, including claiming via their own home/car insurance first. Damage occurred is not automatically covered by this policy, however, the policy should be consulted for further details.

**Mileage payments are not made for the following - such trips are expected to be covered within the basic fostering allowance:**

- Regular health appointments such as GP and dental appointments.
- Out of school activities such as cubs, football practice etc unless further than a 6-mile round trip.
- Family trips and holidays.

## **5.12 Tax relief for Foster Carers**

The introduction of tax relief in 2003 means that foster carers in the UK do not pay tax on their income from fostering, up to a maximum of £10,000 plus allowances.

### **Tax threshold**

**There are two elements to the exemption or 'qualifying amount'.**

- Fixed amount - £10,000 per household a year
- Additional amount per fostered child: £200 per week for a child aged under 11 and £250 per week for a child aged 11 or over.

Income below this qualifying amount is tax free. If the total amount received from fostering exceeds the qualifying amount you can either pay tax on:

- Your total amount received less the qualifying amount or
- Your total amount received from foster care minus expenses. This means keeping records of precise expenditure throughout the tax year using receipts.

If you are exempt, these tax arrangements will not affect any other income you may have (for example income from employment or investment income), which will be taxed in the normal way.

Neither will the tax arrangements affect your personal allowance. If you are exempt, the full amount of your personal allowance is available to use against other income. You should always consult the HMRC website for more detailed information on taxation of your income.

### **Parent and baby schemes**

HMRC will treat both parent and baby as being in foster care and you will be able to claim a weekly amount for each of them when calculating your qualifying amount.

## **National Insurance contributions**

As a foster carer you may be entitled to National Insurance Credits (NIC) <https://www.gov.uk/national-insurance-credits/eligibility>

If you are exempt from tax – you will not have to pay NICs. However, the Fostering Network recommends that you should look at whether it is in your interest to pay NICs. The number of years that you pay NICs may affect benefits you receive in future, for example the state pension.

## **Record keeping**

You will need to keep a record of:

- your total receipts for the year from your local authority, and
- the number of weeks that you care for each child placed with you in the year and the age (or birthday) of each child. A week runs from Monday to Sunday. Count any part of a week as a full week.

If you are not exempt and you intend to calculate your actual profit from foster care worked out using total income, with separate tax relief for allowable expenses or capital allowances, you will need to keep sufficient records to support your figures. You will need to keep these records for six years.

## **Further advice on tax issues**

You can contact your local HMRC office by phone or via the internet - see HMRC website for details, on <https://www.gov.uk/government/publications/qualifying-care-relief-foster-carers-adult-placement-carers-kinship-carers-and-staying-put-carers-hs236-self-assessment-helpsheet/hs236-qualifying-care-relief-foster-carers-adult-placement-carers-kinship-carers-and-staying-put-carers-2022> or contact Tax Aid, a charity which offers free, independent and confidential advice to anyone with a tax question or problem tel: 0845 120 3779. You can visit the Low Incomes Tax Reform Group website:

[www.litrq.org.uk/help/lowincome/selfemployed/assessment.cfm#foster](http://www.litrq.org.uk/help/lowincome/selfemployed/assessment.cfm#foster)

### **5.13 Foster carers' pension**

Foster carers are entitled to 'Home Responsibilities Protection' (HRP). This means the number of years foster carers need to work to qualify for the state pension will be reduced to take into account their years of caring for foster children. This change will increase a foster carers financial security and recognise the importance of the work that they carry out. For more information visit the pensions website at:

[www.pensionservice.gov.uk](http://www.pensionservice.gov.uk)

HMRC have also created a free e-learning module for foster carers which provides detailed information about tax credits and benefits along with advice about registering as self-employed, qualifying for care relief, what records you need to keep for HMRC

and how to foster in partnership. You can access the course here: <http://www.hmrc.gov.uk/courses/syob/fc/index.html>

#### **5.14 Foster carers' property – Insurance, damages, theft etc.**

Where a foster carer's home or property is damaged or items are alleged to have been stolen by the activities of a young person in their care, the foster carer should first report the matter to their supervising social worker. They should then refer to their domestic/car insurance policy and the police if necessary. Where an insurance policy does not provide cover, or the claim is refused, BCBC will consider making a payment depending on the circumstances.

The supervising social worker will need to prepare a report for consideration by the Head of Service. Only the Head of Service, in conjunction with BCBC's Insurance Officers, can agree any compensation.

#### **5.15 Payment adjustments**

Where over payments or under payments occur, the money will be recovered or supplemented as quickly as possible. This will usually be by an adjustment of the next payment.

All foster carers have a responsibility to notify their social worker AND the Fostering Service by phone or email on the day a child leaves the placement or the next working day.

If a foster carer continues to receive payments after reporting that a child has left their care then they must contact the Fostering Service immediately. Any overpayments must be repaid in full to Bridgend County Borough Council.

#### **5.16 Temporary absence from placement (admission to hospital):**

Full payments continue for up to 4 weeks and we will review this thereafter.

#### **5.17 Christmas/Festival and Birthday allowances**

No additional payment is made in relation to Christmas/Festival and birthday allowances as an amount is included within the weekly fee to pay for this.

#### **5.18 Holiday allowance**

No additional payment is made in relation to holidays as an amount is included within the weekly fee to pay for this.

#### **5.19 Pocket Money**

The following principles should guide the payment of pocket money to care experienced children and young people:


- Having pocket money is good for the child/young person. It gives a sense of independence and a measure of choice in making decisions about how the money is spent.
- Receiving pocket money helps children understand the value of money and is the start of developing budgeting skills.
- Carers must encourage children/young people to open a personal savings account.
- The amount to be paid must be clarified at the outset of a placement and addressed within the placement plan. The rate of pocket money paid should be kept under review by all concerned. Setting the appropriate level is dependent on close communication between the carer, child/young person and their social worker and your supervising social worker. If a child/young person is not happy with amount paid, it should be clear how they can raise their dissatisfaction.
- Increase pocket money by a fixed amount at each birthday. In many families an understanding may be reached that once a child is old enough to help out with basic household chores, top-ups to pocket money can be arranged in exchange for jobs done. In some foster placements this could be appropriate, especially in long term placements where such an understanding and trust could be built up over time. In shorter term placements this may be less easy to achieve or inappropriate.
- As a child gets older s/he may want more expensive extras which can be reflected in pocket money or be paid for by the carer out of the basic allowance received.
- To promote a child/young person's positive contact with their birth family top-ups to their pocket money will need to be made to enable birthday and Christmas presents to be bought for birth and foster family members.
- It would be unfair if foster children received either more or less than the foster carer's own children where their ages are similar.
- The rate of pocket money paid to young people should be realistic and guidelines can be found on the Foster Wales Bridgend [webpage](#). It is the responsibility of carers and social workers to help ensure the smooth transition to independent living after foster care. It would be unhelpful to this process if a young person's pocket money enabled her/him to enter into a lifestyle which was not possible if s/he later had to live independently.
- The withholding of pocket money as a punishment is not permissible and alternative acceptable sanctions should be used instead.

## **5.20 Payments to carers facing an allegation who have children removed as a result**

Where carers are subject to an allegation and a child or children placed with them are removed as a result, the carer will continue to receive the Enhanced Allowance for a period of up to four weeks (for each child) whilst investigations are undertaken. Should

an investigation still be ongoing after the four-week period, the situation will be referred to the Head of Service for consideration to continue the payment.

### **5.21 Refer a Friend Recruitment Reward Payment**

The 'refer a friend' (RAF) recruitment reward payment is designed to reward carers who refer someone to  Foster Wales who goes on to become a foster carer. Foster Wales utilise an App to manage the referral scheme which enables the referrer to receive points at each stage of a potential foster carers journey to approval. The referring foster carer will then be able to 'cash-in' their points to a maximum value of £500.

Foster carers will not be held responsible for unsuitable referrals, the reward element is in recognition of sharing a friend or acquaintance's name and contact details only. The responsibility of their suitability to foster will be assessed by the social worker.

Foster carers will provide their consent to sharing their basic contact details directly during the registration process while installing the app.

- Taking part in the points scheme requires the installation of a free app on a mobile device.
- Foster Wales reserves the right to adjust the stages and milestones, following consultation with users.
- Any abuse of the system may result in the removal of recommend the RAF app license.
- The reward payment will apply to each household and not per person in the household.
- Family member(s) or friend(s) who is/are referred must be interested in being approved as general foster carers.
- Family member(s) or friend(s) need to live in Wales (or within 20 miles of Wales).
- To provide a payment to a foster carer living within another local authority, a voucher can be purchased and sent to the carer via their local authority or a payment arranged to their local authority via invoice. This would be completed with the support of the national Foster Wales administrator, when the carer cashed in their points.

### **5.22 Liaison Foster Carers**

Liaison Foster Carers are experienced carers available to provide guidance with queries, concerns and emotional support. The Liaison Carers also run regular coffee mornings providing foster carers with an opportunity to meet and provide support to one another. Liaison Carers also support carers to attend meetings with the team, or if they experience an allegation. Each Liaison carer will receive a weekly allowance for undertaking this role.

### **5.23 Complex Needs Allowance**

Any Approved Foster carers who support children who require a solo placement or present with complex health or behavioural issues, may receive an additional allowance to enable them to support the child's needs. Such circumstances may include but are not limited to:-

- A child's needs requiring a foster carer to make significant adjustments to their working hours over and above reasonable expectations.
- A child being out of education for a significant period or subject to a substantially reduced timetable as a result of complex needs.
- Significant risks posed to the child or placement household from others requiring additional safety measures to be put in place.

Complex needs allowances are considered on a case-by-case basis at the discretion of the local authority in extraordinary circumstances. Complex needs allowances are subject to regular review and are agreed on a time limited basis. A flow chart of the process for agreeing complex needs allowances can be found at **Appendix 3**.

The additional payment being requested should be specific and based on supporting evidence, the amount is variable in accordance with the identified needs and circumstances of the household. Social Workers must explicitly address what other avenues have been explored including whether there is an application for DLA.

In accordance with this policy, all complex needs allowances should be evidenced via the attached proforma and reviewed via the same form. Complex needs allowances are agreed by the Team Manager for Foster Wales Bridgend Foster Carers and subject to regular review. The maximum period a complex needs allowance can be provided is 6 months unless the payment is owing to the young person having clearly evidenced complex health needs, in which case, the payment will be reviewed annually.

Regular Respite – In exceptional circumstances, as part of placement stability support, regular respite can sometimes be agreed for children, which the carers respite allowance in accordance with the finance policy is not utilised. Any regular respite requests must follow the same process as that of complex needs allowances, be clearly evidenced, and reviewed using the proforma found at Appendix 3.

Where agreed, a letter will be sent to the foster carer outlining the payment or respite that has been agreed and the date of the next review. Payments will be ceased 2 weeks after the review date automatically if the review is not undertaken.

### **5.24 Respite Payments**

Every approved foster carer is able to receive up to 2 weeks (14nights) per year paid respite, this is to reflect that the role of the foster carer takes place 24 hours a day, 7 days a week. The 14 nights can be taken as weeks or days and should be discussed and agreed with the foster carers Supervising Social Worker and Social Worker for the

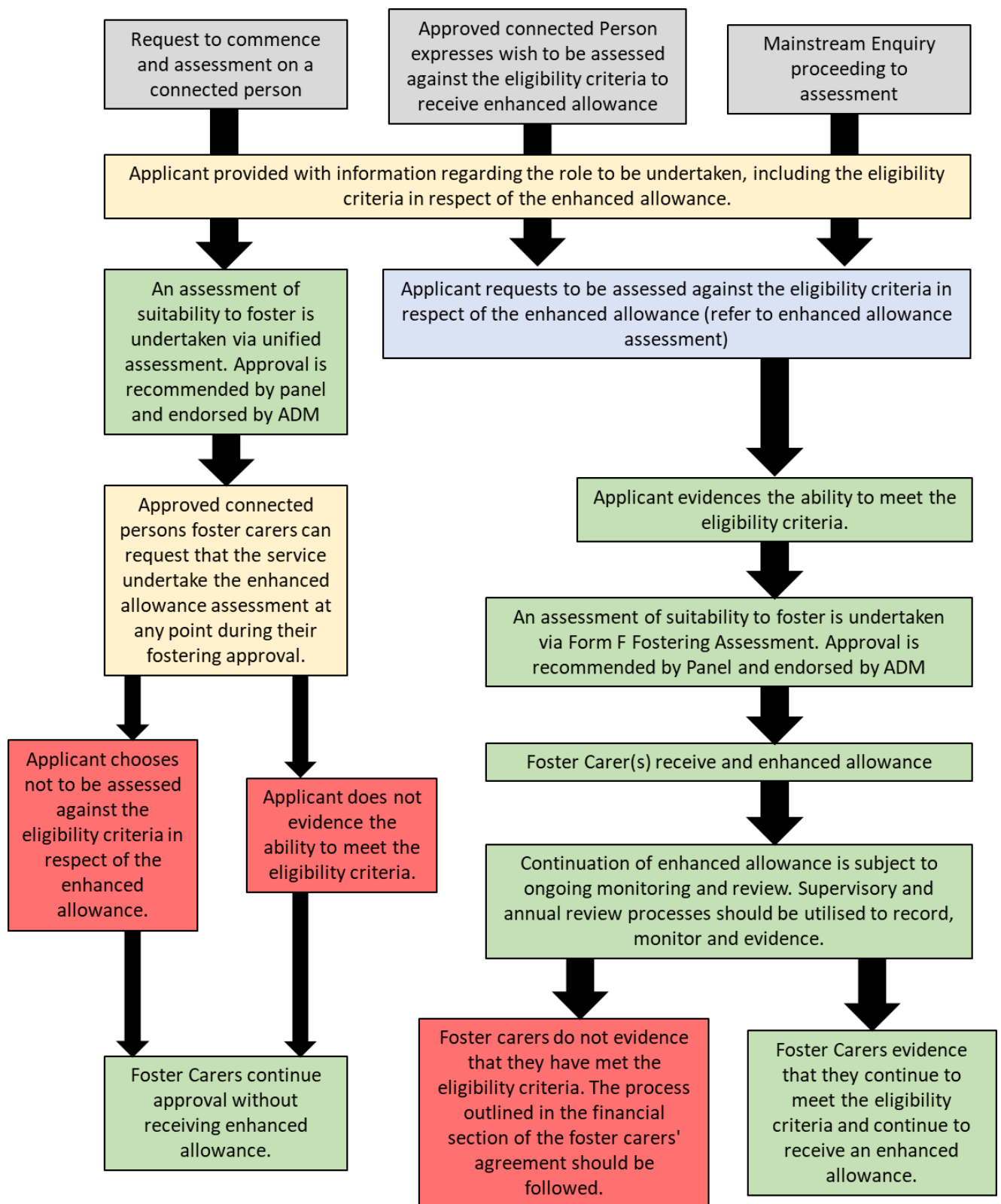
child. The numbers of days taken as respite will be recorded within carers supervision records.

Payments will cease for any respite over and above 2 weeks, unless there is a regular respite arrangement in place to support the placement of a child/ren with complex needs that has been agreed via Accommodation and Permanence Panel and subject to regular review.

Those carers who do not use respite will receive a payment in lieu of respite calculated at the end of the financial year, 31<sup>st</sup> March of any given year.



## Appendix 1



## Appendix 2

### Enhanced Allowance Assessment

Applicant/Foster Carer Name(s): .....

Eligibility to receive an enhanced allowance is assessed against the following criteria:

#### To demonstrate the required skills, ability and competence to care for the range of children a local authority may need to look after

- *Understanding of the fostering role. Understanding of task (e.g. working with parents , child protection, safe care, working with social workers, keeping records, letting go (short-term), persevering (long term), coping with difficult behaviour, special needs etc.*
- *Experience of children and young people, knowledge and understanding of wide range of needs and difficulties a child looked after may have experienced and impact on their behaviour and their ability to develop relationships.*
- *What is the applicants' attitude towards families with a range of social difficulties (alcohol / drug misuse / mental health)?*
- *Do the applicants have an awareness of the reasons for children being received into Care?*
- *Would applicants engage with parents without judgement?*
- *How do the applicants feel about meeting with birth families and having direct involvement, providing and enabling contact to ensure the best outcome for the child?*
- *Ability to place a range of children*

Applicant(s)/Foster Carer(s) evidence to support this requirement:

Assessors evidence and analysis:

- **A commitment to continued individual professional learning, development of their fostering skills and reflection on practice. They must have attended at least 2 training sessions organized or approved by the local authority in any one year and engaged in regular supervision.**
- *Essential for worker to discuss learning and development framework and pre and post approval expectations.*
- *Any previous transferrable skills and qualifications (use part 1 of the L and D plan if necessary).*
- *Applicants own experience of education and further learning.*
- *If already connected persons for the LA have applicants met the suggested hours for learning and development and used the learning and development plan?*
- *Potential for continuous learning.*
- *How have applicants demonstrated commitment to personal development previously*
- *Examples of applicant's ability to reflect on practice*
- *Applicants' ability to record and present information (verbal and written)*
- *Applicants ICT skills*

Applicant(s)/Foster Carer(s) evidence to support this requirement:

Assessors evidence and analysis:

**To demonstrate a commitment to co-production with the fostering service**

- *Evidence of ability to work as part of the team around the child, work with other professionals and contribute to CLA reviews.*
- *Evidence of willingness to engage with other foster carers, access peer support etc.*
- *Evidence of applicant's ability to ask for support when necessary*
- *Evidence of willingness to contribute to consultations, have applicants fed back their views through consultations, surveys etc.*
- *Understanding of Fostering role to support recruitment activity*

Applicant(s)/Foster Carer(s) evidence to support this requirement:

Assessors evidence and analysis:

**Assessors Summary & Recommendation**

**\*Delete as necessary**

**\*Individual(s) do not wish to evidence the ability to meet the eligibility criteria**

- I/we understand that this means I/we will not be entitled to an enhanced allowance.
- I/we understand that I/we can request to be assessed against the eligibility criteria in the future in line with the annual review process

**Name:** .....

**Signature:** .....

**Name:** .....

**Signature:** .....

**\*Individual(s) have not evidenced their ability to meet the eligibility criteria at this time**

- I/we understand that this means I/we will not be entitled to an enhanced allowance.
- I/we understand that I/we can request to be re-assessed against the eligibility criteria in the future in line with the annual review process

**Name:** ..... **Signature:** .....

**Name:** ..... **Signature:** .....

**\*Individual(s) have evidenced their ability to meet the eligibility criteria at this time**

- I/we understand that this means I/we will be entitled to an enhanced allowance upon completion of a full Form F Fostering Assessment
- I/we understand that I/we will be required to continue to evidence the ability to meet the eligibility criteria in order to receive an enhanced allowance.
- I/we understand that this will be subject to continued review under the local authority policy and procedures.

**Name:** ..... **Signature:** .....

**Name:** ..... **Signature:** .....

**Assessors Name:** ..... **Signature:** .....

**Date completed**.....

## Appendix 3

### Complex needs allowance and Regular Respite

Complex need identified by Supervising Social Worker



Proforma completed for the Fostering Team Manager outlining supporting information for the complex needs allowance or regular respite:

- Child's needs
- Impact on carer
- Amount and duration of payment
- Frequency of review



If the Team Manager is in support of the allowance, a letter will be sent to the foster carer outlining the payment or agreement for regular respite and date of review.



In situations where a complex needs allowance has been identified by the Team Manager prior to or during placement searches, this can be agreed via the Group Manager for Placements and Provider Services (or another Group Manager in their absence). In such situations the complex needs allowance will need to be reviewed via Accommodation and Permanence Panel 3 months after the placement has commenced.

#### Complex Needs Review:

Name of Carer	
Carer Agency/ LA	
Name of Child/ren	
Date Respite Agreed	
Reason for Complex Needs Payment: - <i>A child's needs requiring a foster carer to make significant adjustments to their working hours over and above reasonable expectations.</i> - <i>A child being out of education for a significant period or subject to a</i>	

<p><i>substantially reduced timetable as a result of complex needs.</i></p> <ul style="list-style-type: none"> <li>- <i>Significant risks posed to the child or placement household from others requiring additional safety measures to be put in place.</i></li> </ul>	
<p>Current circumstances –  <i>Are the identified reasons for the complex needs payment still evidenced? (feedback from other professionals/ cross referenced with LAC Reviews, Supervision and recordings)</i>  <i>What other supports are considered have been put in place?</i>  <i>Have the foster carer recordings been reviewed?</i>  <i>What is the RAG status?</i>  <i>Is the carer evidencing engagement in learning and development activities to better enable them to support the child's needs?</i></p>	
View of Foster Carer	
View of Child's Social Worker	
View of IRO	
Recommendation of the SSW completing review and reasons (evidence to support how the criteria is/not met in accordance with the policy)	
Team Manager approval:	
Actions:	

Respite Needs Review:

Name of Carer	
Carer Agency/ LA	
Name of Child/ren	
Date Respite Agreed	
Reason for Respite:	
Current circumstances – <i>Are the identified reasons for the respite still evidenced? (feedback from other professionals/ cross referenced with LAC Reviews, Supervision and recordings)</i>	



<p><i>What other supports are considered have been put in place?</i></p> <p><i>Have the foster carer recordings been reviewed?</i></p> <p><i>What is the RAG status?</i></p>	
Evidence Foster Carer engaged in Learning and Development to better enable them to meet needs of child/ren	
View of Foster Carer	
View of Childs Social Worker	
View of IRO	
Recommendation of the SSW completing review and reasons (evidence to support how the criteria is/not met in accordance with the policy)	
Team Manager approval:	
Actions:	

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# Recording Policy for Fostering Services



**January 2024**

Document Name and Location	BCBC Recording Policy for Fostering Services
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## **1. Introduction:**

The Local Authority Fostering Service (Wales) Regulations 2018 and its associated Code of Practice for Local Authority Fostering Services 2019, require that Bridgend County Borough Council Fostering Service (Foster Wales Bridgend) has, and implements, a written policy that supports foster carers to understand the importance of record keeping and provides guidance for the completion of daily logs for any child(ren) they care for.

The following policy covers the following areas as set out by Regulation 37 of the above regulations:

- the records to be maintained by the provider on the children and foster parents using the service.
- the daily records to be maintained by the foster parents for any child placed with them.
- the timescales that records need to be maintained by the provider and foster parents.

## **2. Legal and Regulatory Framework**

The following set of legislation and policies have contributed to and been considered in developing this policy.

- The Social Services and Well-being (Wales) Act 2014
- The Local Authority Fostering Services (Wales) Regulations 2018
- The Code of Practice for Local Authority Fostering Services 2019
- General Data Protection Regulation 2016
- The Fostering Panels (Establishment and Functions) (Wales) Regulations 2018

## **3. The Purpose of Recordings:**

Everyone who works with children who experience care will be involved in recording. Foster carers play a key role in the care of Children Experiencing Care and are uniquely placed to record important information while caring for a child.

It is essential that accurate records are kept, because:

- Records can offer children and young people an opportunity to look back at what has happened during the placement, and to understand why decisions were made.
- Records can help to promote a child's identity.
- Recordings can provide an opportunity to reflect and allow analysis of behaviour.
- They allow sharing of information with other professionals to enhance the child's life.
- They assist in providing continuity when there are changes in care.

- Records can provide accurate information that can be used in plans and assessments about your fostered child.
- The information may be required in court.
- Recording can be useful if allegations are made against a foster carer. It also forms part of ensuring foster carers are meeting the accountability and standards expected.
- Recording supports the supervision and professional development processes of a foster carer.

#### **4. Records to be maintained by Foster Wales Bridgend**

The following list is the list of records that will be kept and maintained by Foster Wales Bridgend with regard to the children and foster carers using the foster service:

- Name and Date Of Birth of children placed in foster care
- Name and contact information of all foster carers
- Date of the Foster Carer's approval by the Fostering Panel and the review date
- Dates of commencement and ending of children placed with foster carers.
- Assessments of foster carers and information required as part of the assessment process in accordance with the The Fostering Panels (Establishment and Functions) (Wales) Regulations 2018
- Correspondence received regarding foster carers that may include but not limited to compliments, concerns and complaints
- Records of visits to foster carers
- The total number of foster carers registered with the service.
- Records of receiving foster carer daily logs
- Records of concerns regarding a child or foster carer
- Training courses provided to foster carers
- Any other information that is relevant to fostering approval or suitability to foster.

Supervising Social Workers and Children's Social workers should follow the requirements of Bridgend County Borough Council's (BCBC) Social Services and Wellbeing's [Recording Guidance](#).

#### **5. The Content and Style of Foster Carer Recordings**

Foster Carers are expected to keep a record of all significant events and incidents during the child's placement with them. They must include anything that they think is important, even if it seems a small detail. However, they are not required to record anything or everything each day.

Foster Carers are encouraged to be consistent in the completion of recordings. The frequency of recordings may vary depending on the child they are caring for and their care and support plan. For example, where a child is recently accommodated there may be a need to record daily to understand patterns in the child's behaviour or

provide information to court, however if they have cared for a child for a number of years the need may be less frequent. The Foster Carer will discuss and agree with the Supervising Social Worker and child's social worker the level of recording that is needed.

Foster Carers should ensure that all records are relevant, accurate, up to date, and stored securely in line with the Data Protection Act 2018.

Recordings need to be clear and legible, and the language should be kept simple and free of jargon. These records should be useful to the child or young person now and in the future and the foster carer should write in a way that they would be happy for the child or young person to read what has been written. However, in the event of a child making a disclosure/allegation care should be taken to record factually what was said by the child. Recordings should offer a balanced view of the child's life and include the good points as well as the more difficult points. Where requests are made from children and young people to view their files, consideration will be given to any confidential or inaccurate information that cannot be shared and will be redacted.

Records should be kept in date order, on the recording log provided by the Fostering Service as per Appendix 1, with a separate log for each child placed with them. Recording logs should be completed either on paper and stored securely in a lockable drawer or suitable alternative or completed electronically utilising a password that only the foster carer and supervising social worker have, stored and shared securely with their supervising social worker. Hard copies of the recording log are available for use in emergencies.

Foster carers should avoid recording opinion and stick to the facts wherever possible, however, if there is the need to record an opinion about an event, the foster carer must make sure that this is clearly stated as their opinion.

Records should include the following:

- Details of the improvements and achievements of the fostered child.
- Any physical interventions. The record must detail what happened before, when it happened, and how it was dealt with. All incidents need to be reported to your supervising social worker within 24 hours in line with the requirements of the fostering service policy on the appropriate use of control and restraint. If there are any injuries because of the incident, these need to be reported immediately to the supervising social worker or to the Emergency Duty Team (EDT) if outside of office hours and ensure that the injured individual receives the appropriate medical treatment.
- Quotes or comments from the fostered child or young person. These can be useful for the child or young person to look back on and can provide important evidence for assessments.
- Details of delegated authority decisions and how you reach such decisions.



- Any significant changes in the child's behaviour (both positive and negative changes), and how this was dealt with.
- Family events and traditions, such as Birthdays, Holidays and Festivals, which the child is part of.
- Contact with other agencies and professionals.
- Details of any times that the child is away from the foster home, with friends, birth family, or missing.
- Details of contact visits, including how the child or young person responded, and any reasons for failed visits.
- Disagreements and complaints, and how they were dealt with.
- Details of visits by the child's social worker and the supervising social worker, including details of any missed meetings and any agreed actions.
- Details of any theft by the foster child, or damage caused by the foster child.
- Details of any specific events or changes in the foster carer household that may have an impact on the foster child.

Details of consultations with health professionals and administration of medication should be recorded in the Child's Health Record, in line with the Management and Administration of Medication for Fostering Services policy. However, daily recording logs should contain reference to any consultation or administration of medicine.

Details of any accidents/incidents that occur while a child is in the care of a foster carer needs to be recorded and reported in line with the Fostering Service Management and Administration of Medication for Children Looked After policy.

## **6. What information will Foster Carer's record**

Foster carers will be provided with a recording log for each child or young person placed with them as per Appendix 1. The Foster Carer must use separate logs for each child.

The following are examples of some kinds of information that a Foster Carer may need to record:

### Health and Development Records

- Details of developmental milestones and achievements – a developmental chart is available from your health visitor, or for younger children the information you record should complement the 'Red Log'.
- Patterns to allergic reactions, or asthma attacks.
- Symptoms and progress of any illnesses.
- Reference to appointments and telephone calls with medical practitioners.
- Reference to medication that you give to the child or young person, prescribed and non-prescribed.

- Record details of any chemical treatments for head lice.
- Record the child's response and any reactions.
- Record any self-administered medication for young people assessed as being of the age and understanding to self-administer.

#### Education

- Record details of all visits and telephone calls regarding education, including Personal Education Plan (PEP) meetings, parents evening etc.
- Record achievements and attainment at school, or school related activities.
- Record details of extra-curricular activities (social/ leisure/ play activities) in and out of school.

#### Social worker and other professionals' visits

- All visits and telephone calls from Children's Social Care staff, including your supervising social worker, and professionals other than Health and Education.
- The record of all appointments for the foster carer should be kept separately.

#### Contact

- Details of all forms of contact between the child or young person and their birth family; include details of all telephone calls, text messages, emails and visits.
- Complete the record if planned contact did not go ahead, recording the reason why the contact did not go ahead.
- Record the child or young person's responses and reactions to any contact arrangements.

#### Missing from foster home

- The Foster Wales Bridgend - Missing policy should be followed.
- An up-to-date child information form should be kept for use by the police - this should be updated every 6 months.
- For some young people, assessed as being at risk from influences in the community, record their significant "comings and goings" and any regular visitors they have to the foster home.

#### Incidents and Injuries

- Reference to any incident/ accident and record when the incident/accident form is completed and sent to the supervising social worker.
- Always inform the child's social worker and the supervising social worker of all significant incidents and injuries.

- Incidents include an episode of self-harming, any incident that involves the foster carer or a member of their household being harmed or injured by the child or young person.
- Details of any incidents, which involve physically restraining the child or young person.

The foster carer should always inform the child's social worker and their supervising social worker of any of these incidents.

### Family Life

- Record anything about family life that is significant or important. Family traditions and funny stories are important as these can help the child recall significant events and help with understanding their life journey.
- Record family events, religious events, family celebrations, the child's achievements, rewards and sanctions that were given and any staying visitors to the household.
- Record any positive behaviour or positive changes in behaviour e.g., if a child is kind or caring.
- Record any difficult behaviour that a child displays, how it was managed, what worked, what did not work, what the possible 'triggers' might have been.

Respite carers will be provided with recording sheets to be completed for each episode of respite care. The foster carer will give these sheets to your supervising social worker who will ensure they are uploaded to the child's electronic file and any pertinent information forwarded to the main carers SSW to share with the main carers.

## **7. Foster Carer responsibilities in relation to storage and confidentiality**

Whilst the Foster Carer records hold information on looked after children and young people, this is on behalf of The Fostering Service. All information provided about a child, who is or has been placed with a foster carer is confidential and governed by the Data Protection Act 2018. Information about a child, young person, or his or her family should only be provided to another person if it is for the purpose of the child or young person's protection or welfare, consent from the local authority should be sought before sharing any information unless failure to do so would present an immediate risk of harm to the child. Whilst the child is in placement with a foster carer, they are expected to keep information in a safe, secure and confidential manner in their home, whether the documents are electronic or in paper format.

Recording logs should be kept electronically using the word document your supervising social worker provides. When using a computer to record information, make sure the computer and the files are password protected with a secure password. Do not send confidential information as part of the email message itself, as non-BCBC

email addresses will not be secure. Foster Carers will only use initials and not names when sending a document electronically. Any documents to be sent via secure email using egress or password protected with the password shared via telephone with the receiving Supervising Social Worker.

We recognise that issues of confidentiality relate not only to record keeping, but also in a wider sense to conversations the Foster Carer may have with family and friends and in the community. There are situations where there is a legitimate need to share information relating to the background of the fostered child with family or friends who are involved in their care, for the purpose of the child's protection and welfare. However, seemingly innocent conversations within the community could lead to accidental breaches of the child's confidentiality. A breach of confidentiality could lead to a review, through the Fostering panel, of the suitability of the individual as a foster carer. If a Foster Carer has any concerns about confidentiality, or if they are worried, they may have accidentally breached confidentiality, they must talk to their supervising social worker.

## **8. Responsibilities of the Supervising Social Worker**

The supervising social worker is required to regularly read the recording logs, and record receipt of logs on the foster carer's electronic file before passing to the child's social worker to store on the child or young person's file within the children's social care electronic recording system (WCCIS).

For respite carers, the supervising social worker will ensure that the recording logs are shared with the primary foster carer to be included in the child's recording log where appropriate or passed to the child's social worker to upload electronically to the child's electronic file.

Where there is a requirement of court to submit recording logs the foster carer will need to send these to the supervising social worker, who will ensure these are submitted to the child's social worker, in line with the required deadlines. If the supervising social worker is absent from work, when the logs are required, the foster carer will send the recording logs directly to the child's social worker.

## **9. End of Placement Recording**

At the end of a placement, the record log will be sent to the supervising social worker and the child's social worker is informed the log has been collected. All electronic logs are to be deleted from the Foster Carer's computer. The Foster Carer is required to keep a record of the child's name, the date the placement commenced and ended, and the date when the information was returned to Foster Wales.

## **10. Further Information and Advice on Recordings**

Good practice tips:

- Be accurate
- Be concise
- Avoid personal views
- Record child's comments in the child's words
- Keep records separate for different children
- Record in date order
- Keep all information secure and confidential
- Write in a way that you would be happy for the child or young person to read what you have written

Talk to your supervising social worker if you are unsure of what you should be recording, and remember, the information that you record may be invaluable to your fostered child.

## Appendix 1 – Foster Care Record

### Foster Wales Bridgend

#### DAILY/ WEEKLY FOSTERING CASE RECORDING SHEET

<b>Date of Recording:</b>	<b>Child/Young Person:</b>	<b>Date Completed:</b>	<b>Page No:</b>
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	<b>Health – Any relevant appointments, injuries, illness or therapy? Please note any medication administered and applicable dates and any first aid administered.</b>
	<b>Education – Any matters arising, attendance or awards?</b>
	<b>Behaviour – Any significant behaviour or incidents (positive or negative)?</b>
	<b>Contact - Any visits that have occurred, issues or problems?</b>
	<b>Leisure – Any activities, outings or achievements?</b>
	<b>Please note: If there is nothing of significance to report insert not applicable in the column. Please use continuation form if you have more information to record.</b>
<b>Author</b>	<b>PLEASE LEGIBLY SIGN AND DATE ALL ENTRIES</b>

**CASE RECORDING SHEET (continued):**

<b>Date of Recording:</b>	<b>Please use the relevant heading if you have continued information to record.</b>
<b>Author</b>	PLEASE LEGIBLY SIGN AND DATE ALL ENTRIES

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