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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. Rhowch wybod i ni os mai Cymraeg yw eich dewis iaith.

We welcome correspondence in Welsh. Please let us know if your language choice is Welsh.



Cyfarwyddiaeth y Prif Weithredwr / Chief Executive's Directorate
Deialu uniongyrchol / Direct line /: 01656 643148 / 643694 / 643513
Gofynnwch am / Ask for: Gwasanaethau Democrataidd

Ein cyf / Our ref:
Eich cyf / Your ref:

Dyddiad/Date: Dydd Llun, 23 Mehefin 2025

Annwyl Cyngorydd,

PWYLLGOR TROSOLWG A CHRAFFU CORFFORAETHOL

Cynhelir Cyfarfod Pwyllgor Trosolwg a Chraffu Corfforaethol Hybrid yn Siambr y Cyngor – y Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-Bont ar Ogwr, CF31 4WB / o bell trwy Microsoft Teams ar **Dydd Llun, 30 Mehefin 2025 am 10:00.**

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

I dderbyn am gymeradwyaeth y Cofnodion cyfarfod y 17/03/2025

5 - 12

4 Alldro Cyllideb Refeniw 2024-25

13 - 60

Gwahoddwyr:

Y Cynghorydd John Spanswick - Arweinydd
Y Cynghorydd Jane Gebbie - Dirprwy Arweinydd / Aelod Cabinet dros Wasanaethau Cymdeithasol, Iechyd a Llesiant
Y Cynghorydd Hywel Williams - Aelod Cabinet dros Gyllid a Pherfformiad
Y Cynghorydd Martyn Jones - Aelod Cabinet dros Wasanaethau Addysg ac Iechyd
Y Cynghorydd Paul Davies - Aelod Cabinet dros Newid yn yr Hinsawdd a'r Amgylchedd
Y Cynghorydd Eugene Caparros - Aelod Cabinet dros Adnoddau (Rhannu Swydd)
Y Cynghorydd Melanie Evans - Aelod Cabinet dros Adnoddau (Rhannu Swydd)
Y Cynghorydd Neelo Farr - Aelod Cabinet dros Adfywiad, Datblygiad Economaidd a Thai

Carys Lord - Pennaeth Cyllid, Tai a Newid
Lindsay Harvey - Cyfarwyddwr Corfforaethol – Addysg, Blynyddoedd Cynnar a Phobl Ifanc
Claire Marchant - Cyfarwyddwr Corfforaethol - Gwasanaethau Cymdeithasol a Lles
Janine Nightingale - Cyfarwyddwr Corfforaethol - Cymunedau
Kelly Watson - Prif Swyddog, Gwasanaethau Cyfreithiol a Rheoleiddio, AD a Pholisi Corfforaethol

5 Grwp Gwaith Craffu ar y Gyllideb

61 - 70

6 Casgliadau ac Argymhellion

7 Adroddiad Enwebu Hyrwyddwr Rhianta Corfforaethol

71 - 74

8 Enwebiadau Pwyllgor Trosolwg a Chraffu ar y Cyd Bwrdd Gwasanaethau Cyhoeddus Cwm Taf Morganwg

75 - 78

9 Diweddariad Rhaglen Gwaith

79 - 100

10 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 Rhan 4 (pharagraff 4) o'r Rheolau Trefn y Cyngor 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 neu ffoniwch 01656 643148 / 643694 / 643513 / 643159

Yn ddiffuant

K Watson

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

Dosbarthiad:

Cynghorwr:

F D Bletsoe

JPD Blundell

N Clarke

HJ David

H Griffiths

S J Griffiths

GH Haines

M L Hughes

J Llewellyn-Hopkins

RL Penhale-Thomas

T Thomas

A Ulberini-Williams

AJ Williams

MJ Williams

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PWYLLGOR TROSOLWG A CHRAFFU CORFFORAETHOL - DYDD LLUN, 17 MAWRTH 2025

COFNODION CYFARFOD Y PWYLLGOR TROSOLWG A CHRAFFU CORFFORAETHOL A GYNHALIWDYD YN HYBRID YN SIAMBR Y CYNGOR, Y SWYDDFEYDD DINESIG, STRYD YR ANGEL, PEN-Y-BONT AR OGWR CF31 4WB / O BELL DRWY GYFRWNG TIMAU MICROSOFT DDYDD LLUN, 17 MAWRTH 2025 AM 10 O'R GLOCH

Presennol

Y Cyngorydd JPD Blundell – Cadeirydd y Cyfarfod

GH Haines

Yn bresennol yn rhithwir

HJ David
AJ Williams

M L Hughes
E D Winstanley

RL Penhale-Thomas

T Thomas

Ymddiheuriadau am Absenoldeb

F D Bletsoe, RM Granville, S J Griffiths ac A Ulberini-Williams

Y Cyngorydd Jane Gebbie, Dirprwy Arweinydd ac Aelod o'r Cabinet dros y Gwasanaethau Cymdeithasol, Iechyd a Lles, Y Cyngorydd Paul Davies, Aelod o'r Cabinet dros y Newid yn yr Hinsawdd a'r Amgylchedd, Y Cyngorydd Eugene Caparros, Aelod o'r Cabinet dros Adnoddau (Rhannu Swydd) a Kelly Watson, Prif Swyddog – Gwasanaethau Cyfreithiol a Rheoleiddiol AD a Pholisi Corfforaethol.

Gwahoddedigion:

Y Cyngorydd John Spanswick
Y Cyngorydd Hywel Williams
Y Cyngorydd Martyn Jones
Y Cyngorydd Neelo Farr
Y Cyngorydd Melanie Evans

Mark Shepherd
Carys Lord
Lindsay Harvey

Yr Arweinydd
Aelod o'r Cabinet dros Gyllid a Pherfformiad
Aelod o'r Cabinet dros Addysg a Gwasanaethau Ieuencid
Aelod o'r Cabinet dros Adfywiad, Datblygu Economaidd a Thai
Aelod o'r Cabinet dros Adnoddau (Rhannu Swydd)

Y Prif Weithredwr
Prif Swyddog – Cyllid, Tai a Newid
Cyfarwyddwr Corfforaethol – Addysg, y Blynyddoedd Cynnar a Phobl Ifanc

PWYLLGOR TROSOLWG A CHRAFFU CORFFORAETHOL - DYDD LLUN, 17 MAWRTH 2025

Claire Marchant	Cyfarwyddwr Corfforaethol – Y Gwasanaethau Cymdeithasol a Lles
Janine Nightingale	Cyfarwyddwr Corfforaethol – Y Cymunedau
Alex Rawlin	Rheolwr Polisi a Pherfformiad Corfforaethol
Kate Pask	Rheolwr Perfformiad Corfforaethol
Martin Morgans	Pennaeth Gwasanaethau Partneriaeth
Paul Miles	Rheolwr Grŵp – Adnoddau Dynol a Datblygiad Sefydliadol

Swyddogion:

Meryl Lawrence	Uwch Swyddog y Gwasanaethau Democrataidd - Craffu
Jessica Mclellan	Swyddog Craffu

Datganiadau o Fuddiannau

Y Cyng Amanda Williams – eitem 4 – personol – fel Cynghorydd Cymunedol dros Gyngor Cymuned Coety Uchaf sy'n ceisio trosglwyddo eiddo sy'n ased oddi wrth Gyngor Bwrdeistref Pen-y-bont ar Ogwr.

Y Cyng Elaine Winstanley – eitemau 4 a 5 – personol – fel llywodraethwr mewn dwy ysgol a grybwyllwyd yn y broses moderneiddio ysgolion, roedd yn cymryd rhan mewn cynnal gweithgareddau 'Bwyd a Hwyl' fel y soniwyd yn yr adroddiad ac fel un yn cael ei chyflogi gan ymddiriedolaeth ddiwylliannol AWEN sy'n rheoli Pafiliwn y Grand a'r gwasanaeth llyfrgell a grybwyllwyd yn yr adroddiad.

Y Cyng Tim Thomas – eitem 6 - personol – yn ymwneud â Gweinyddiaeth Tai, Cymunedau a Llywodraeth Leol Llywodraeth y DU a Llywodraeth yr Alban ynghylch Grantiau Cyfleusterau i'r Anabl.

148. Cymeradwyo'r Cofnodion

Y Penderfyniad Wnaed	<u>PENDERFYNWYD:</u> Cymeradwyo cofnodion cyfarfodydd y Pwyllgor Trosolwg a Chraffu Corfforaethol dyddiedig 15 a 28 Ionawr 2025 fel cofnod gwir a chywir.
Dyddiad Gwneud y Penderfyniad	17 Mawrth 2025

149. Perfformiad Chwarter 3 2024/25

Y Penderfyniad Wnaed	<u>PENDERFYNWYD:</u> Yn dilyn ystyried yr adroddiad a'i drafod yn fanwl gydag Aelodau'r Cabinet ac Uwch Swyddogion, gwnaeth y Pwyllgor yr argymhellion a'r ceisiadau am wybodaeth ychwanegol a ganlyn: <u>Argymhellion</u> 1. Bu'r aelodau'n trafod salwch staff a'r cymorth a gynigir, a bod rhai Cyrff Llywodraethol yn cynnig mynediad ar-lein at Feddyg Teulu ar gyfer presgripsiynau preifat fel rhan o'u pecyn cymorth lles i'r staff. Argymhellodd y Pwyllgor y dylid edrych i mewn i'r dewis hwn o ddarpariaeth ar gyfer staff y Cyngor a chysylltu â chydweithwyr mewn ysgolion lle cafodd y cynnig ei wneud i gael manylion. 2. Cyfeiriodd yr Aelodau at y broblem o beidio â chael mynediad at ddogfennau sydd ar gael ar fewnwyd y staff, megis Cynlluniau Busnes y Cyfarwyddiaethau, ac argymhellodd y Pwyllgor y dylid cyflymu'r posibilrwydd o integreiddio dolen at y wybodaeth ar Borth yr Aelodau tra'n disgwyl am brawf tymor hwy o'r model gwaith sylfaenol a fyddai'n caniatáu mynediad drwy'r fewnwyd. <u>Gwybodaeth Ychwanegol</u> 3. Cydnabu'r Pwyllgor fod y targed o 100% ar gyfer staff sy'n cwblhau e-ddysgu gorfodol yn afrealistig am nifer o resymau a nododd fod adolygiad ar y gweill i geisio creu dull mwy deallus/blaenoriaethol o ymdrin ag e-ddysgu gorfodol. Fodd bynnag, gofynnodd y Pwyllgor am ddata yn dangos y ffactorau oedd yn cyfrannu at atal y targed o 100% rhag cael ei gyrraedd. At hynny, gofynnodd y Pwyllgor i'r naratif yn y Dangosfwrdd Perfformiad adlewyrchu'r ffaith nad yw'r ffigwr yn cynnwys absenoldeb staff oherwydd salwch, absenoldeb mamolaeth neu dadolaeth ac yn y blaen tra'n disgwyl am newid posibl i'r targed yn dilyn yr adolygiad sydd yn mynd yn ei flaen. 4. Gofynnodd y Pwyllgor am ddiweddariad ynghylch statws y cais cynllunio mewn perthynas â moderneiddio ysgolion Ysgol Y Ferch O'r Sger. 5. Gofynnodd y Pwyllgor am wybodaeth ynghylch y weithdrefn i asesu Tystysgrif Perfformiad Ynni ar gyfer adeiladau'r sector cyhoeddus yn y Fwrdeistref Sirol a'u mesuriadau ynni.
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PWYLLGOR TROSOLWG A CHRAFFU CORFFORAETHOL - DYDD LLUN, 17 MAWRTH 2025

	6. Cyfeiriodd yr Aelodau at ddatblygiad Model Gwasanaethau Gwastraff y Dyfodol drwy dynnu'r gwasanaeth i mewn, a gofynnwyd am i wybodaeth / diweddariadau rheolaidd gael eu darparu ar gyfer yr Aelodau i sicrhau bod yr Aelodau'n cael gwybod am y cynnydd a'u galluogi i reoli disgwyliadau trigolion. 7. Gan gyfeirio at Ddangosydd Perfformiad: CED5, 'Canran y datrysiadau ar yr alwad gyntaf', i ymholiadau nad oeddent yn arwain at ddatrysiad ar yr alwad gyntaf, gofynnodd y Pwyllgor am wybodaeth am ba hyd yr oeddent yn parhau yn y system a faint o alwadau yr oeddent yn eu cymryd i gael eu datrys. 8. Gan gyfeirio at Ddangosydd Perfformiad (DP): DRW6.1.1, 'Canran y gostyngiadau cyffredinol yng nghyllideb CBSP a gyflawnwyd', mynegodd y Pwyllgor bryder ynghylch p'un a oedd y targed blyneddol o £13,045 miliwn ac amrywiad o £1.441 miliwn yn cynnwys yr arbediad effeithlonrwydd o 3% yn erbyn Cyllidebau Dirprwyedig Ysgolion (£3.441 miliwn) a balansau diffyg ysgolion o £4.989 miliwn. Gofynnodd y Pwyllgor am ddadansoddiad cryno ysgrifenedig o'r ffigurau i gynnwys arddangosiad o'r hyn a ragwelwyd, yr hyn sydd wedi'i gynnwys a beth oedd y diffyg gafodd ei ddwyn ymlaen i'r flwyddyn hon.
Dyddiad Gwneud y Penderfyniad	17 Mawrth 2025

150. Adolygiad o'r Cynllun Corfforaethol am 2025/26

Y Penderfyniad Wnaed	<u>PENDERFYNWYD:</u> Yn dilyn ystyried yr adroddiad a'i drafod yn fanwl gydag Aelodau'r Cabinet ac Uwch Swyddogion, gwnaeth y Pwyllgor yr argymhelliad canlynol am wybodaeth ychwanegol: <u>Argymhelliad</u> 1. Argymhellodd y Pwyllgor ailystyried y bwriad i gyfuno'r nodau a'r dangosyddion perfformiad canlynol gan gydnabod eu bod ill dau yn feysydd mawr a gwahanol ac, fel y cyfryw, y dylent aros
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PWYLLGOR TROSOLWG A CHRAFFU CORFFORAETHOL - DYDD LLUN, 17 MAWRTH 2025

	ar wahân yn unol â'r Amcanion Llesiant presennol: a. Amcan Llesiant 1 – Nod: 'Adfywio canol ein trefi a'n Cymoedd' b. Amcan Llesiant 4 – DP: 'Atal digartrefedd' a 'Dyddiau i Sicrhau Grantiau Cyfleusterau i'r Anabl'.
Dyddiad Gwneud y Penderfyniad	17 Mawrth 2025

151. **Diweddariad a Datganiad o'r Sefyllfa ynghylch y Gwasanaeth Grantiau Cyfleusterau i'r Anabl**

Y Penderfyniad Wnaed	<u>PENDERFYNWYD:</u> Yn dilyn ystyried yr adroddiad a'i drafod yn fanwl gydag Aelod o'r Cabinet ac Uwch Swyddogion, gwnaeth y Pwyllgor yr argymhelliad a'r ceisiadau am wybodaeth ychwanegol a ganlyn: <u>Argymhelliad</u> 2. Cyfeiriodd y Pwyllgor at y sylw gan y Pwyllgor Llywodraethu ac Archwilio mai'r "unig ffordd y gellid creu mwy o swyddi oedd gyda chyfalaf ychwanegol" a bod rhagfynegiadau gan Swyddfa Archwilio Cymru ynghylch y ddemograffeg a'r boblogaeth sy'n heneiddio yn dangos mai dim ond cynyddu yr oedd y galw am Grantiau Cyfleusterau i'r Anabl (GCA) yn debygol o wneud. Felly, Argymhellodd y Pwyllgor, y dylid plymio'n ddwfn i bwnc GCA a'r ystyriaethau uchod. yn ystod trafodaethau cynnar y Pwyllgor ynghylch y gyllideb <u>Gwybodaeth Ychwanegol</u> 3. Gofynnodd y Pwyllgor am ddadansoddiad o GCA fesul achosion oedolion a phlant a gofynnodd i adroddiadau yn y dyfodol ynghylch GCA hefyd nodi'r ffigurau yn y modd hwn. 4. Gofynnodd y Pwyllgor am ddadansoddiad o GCA yn ôl deiliadaeth tai gan gydnabod sylwadau Swyddogion mai Landlordiaid Cymdeithasol Cofrestredig sy'n gyfrifol am eu haddasiadau.
Dyddiad Gwneud y Penderfyniad	17 Mawrth 2025

152. Adolygiad Craffu

Y Penderfyniad Wnaed	<u>PENDERFYNWYD:</u> Ar ôl ystyried yr adroddiad, gwnaeth y Pwyllgor yr argymhelliad a'r cais a ganlyn: - O'r dewisiadau a gyflwynwyd yn yr adroddiad, roedd y Pwyllgor yn unfrydol o blaid ac yn argymhell dewis 2; cadw 4 Pwyllgor Craffu gyda'r Pwyllgor Trosolwg a Chraffu Corfforaethol a thri Phwyllgor â thema ffurfiol: 'Addysg, Gwasanaethau Cymdeithasol a Chymunedau' neu debyg. Roedd hyn ar yr amod bod y cafeatau yn yr adroddiad yn cael eu cynnwys yn yr ystyr na fyddai enwau a chylchoedd gorchwyl y Pwyllgorau yn atal un Pwyllgor rhag craffu ar eitem yn ei chyfanrwydd pe bai unrhyw agwedd yn crwydro ychydig i gylch gorchwyl un arall. - Bu'r Pwyllgor hefyd yn trafod materion megis hyd cyfarfodydd ac agendâu, ymgysylltiad Aelodau, nifer y cyfarfodydd, adnoddau a llwyth gwaith a nifer y Cadeiryddion, ond cytunwyd y byddai angen trafod y materion hyn ymhellach yng nghyfarfodydd y Cyngor ac yng nghyfarfodydd Grwpiau Gwleidyddol perthnasol. Gofynnodd yr Aelodau i Gadeiryddion ac Arweinwyr Grwpiau rannu'r Dewisiadau o Strwythur Pwyllgorau a'r Protocol Craffu gyda holl Aelodau'r Grwpiau Gwleidyddol, yn ogystal â'r 3 Aelod Annibynnol nad ydynt yn gysylltiedig ag unrhyw Grŵp, cyn gynted â phosibl cyn cyfarfod y Cyngor.
Dyddiad Gwneud y Penderfyniad	17 Mawrth 2025

153. Diweddariad ar y Flaenraglen Waith

Y Penderfyniad Wnaed	<u>PENDERFYNWYD:</u> Ar ôl ystyried yr adroddiad, cymeradwyodd y Pwyllgor ei Flaenraglen Gwaith (FWP) yn Atodiad A yn amodol ar gynnwys yr argymhellion isod, nododd y Blaenraglenni Gwaith ar gyfer y Pwyllgorau Trosolwg a Chraffu Pwnc yn Atodiadau C, D ac E, nododd y Daflen Weithredu Monitro Argymhellion i olrhain ymatebion i Argymhellion y Pwyllgor a wnaed mewn cyfarfodydd blaenorol yn Atodiad B a chydabu'r adroddiadau Rheoleiddio yr adroddwyd amdanynt yn ddiweddar wrth y Pwyllgor Llywodraethu ac Archwilio:
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	<u>Y Pwyllgor Trosolwg a Chraffu Corfforaethol (COSC)</u> Gofynnodd y Pwyllgor am i'r adroddiadau a ganlyn gael eu hychwanegu at eu Blaenraglen Waith: - Arolwg Staff (gan gynnwys ymatebion, canlyniad grwpiau ffocws staff ac arolygon staff yn y dyfodol); a - Cynllun Cyflawni'r Cynllun Corfforaethol 2025-26. - Bu'r Pwyllgor yn ystyried yr atgyfeiriad gan y Pwyllgor Llywodraethu ac Archwilio a gofynnodd am ragor o wybodaeth ynghylch Partneriaeth Prosesu Cosbau Cymru cyn ystyried a ddylid ychwanegu'r pwnc at Flaenraglen Gwaith Craffu. Unwaith y byddai'r wybodaeth uchod wedi cael ei chasglu, cytunodd y Pwyllgor y câi'r amserlen arfaethedig ar gyfer yr Eitem ei thrafod rhwng Cadeiryddion Craffu a Swyddogion Craffu. <u>Pwyllgor Trosolwg a Chraffu ar Bwnc 1 (SOSC 1)</u> - Mynegodd y Pwyllgor bryder na chyrhaeddwyd targed y DP o 100% yn ymwneud â chyflwyno cynlluniau datblygu unigol (CDU) gan ddefnyddio'r system CDU ar-lein (0%) a gofynnodd i SOSC 1 ystyried gofyn am adroddiad i fonitro'r sefyllfa. - Edrychodd y Pwyllgor i mewn i'r cysylltiad posibl rhwng ymddygiad disgyblion a gwaharddiadau parhaol, a chymorth i ddisgyblion ag anghenion dysgu ychwanegol a'r rhestrau aros am ddarpariaeth arbenigol. Felly, gofynnodd y Pwyllgor i gwmpas yr adroddiad ynghylch Ymddygiad Disgyblion a oedd wedi'i amserlennu ar gyfer SOSC 1 ar 8 Mai 2025 gynnwys crynodeb o'r cynllun 5 mlynedd drafft a ddatblygwyd i fynd i'r afael â'r galw ar wasanaethau cymorth, darpariaeth arbenigol ac ysgolion. <u>Pwyllgor Trosolwg a Chraffu ar Bwnc 3 (SOSC 3)</u> Gofynnodd y Pwyllgor am i adroddiad ar y Gronfa Ffyniant Gyffredin gael ei amserlennu ar y flaenraglen waith ar gyfer SOSC 3 cyn gynted â phosibl.
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PWYLLGOR TROSOLWG A CHRAFFU CORFFORAETHOL - DYDD LLUN, 17 MAWRTH 2025

	6. Cyfeiriodd y Pwyllgor at yr argymhelliad a wnaed ganddynt ar 16 Rhagfyr 2024 bod SOSC 3 yn ystyried gofyn am adroddiad ynghylch ymateb y Cyngor i dywydd garw/stormydd. Gofynnodd y Pwyllgor i gwmpas yr adroddiad hwnnw gynnwys manylion am y wybodaeth a rannwyd yn ystod sesiynau gwybodaeth mewnol a Fforwm Lleol Cymru Gydnerth a gynhaliwyd yn dilyn Storm Darragh ac unrhyw ddigwyddiadau tywydd garw eraill.
Dyddiad Gwneud y Penderfyniad	17 Mawrth 2025

154. Eitemau Brys

Y Penderfyniad Wnaed	Dim
Dyddiad Gwneud y Penderfyniad	17 Mawrth 2025

I wyllo dadl bellach a gymerodd le ynghylch yr eitemau uchod, cliciwch ar y [ddolen](#) hon

Daeth y cyfarfod i ben am 14:29.

Meeting of:	CORPORATE OVERVIEW AND SCRUTINY COMMITTEE
Date of Meeting:	30 JUNE 2025
Report Title:	REVENUE BUDGET OUTTURN 2024-25
Report Owner/ Corporate Director:	CHIEF OFFICER – FINANCE, HOUSING AND CHANGE
Responsible Officer:	JOANNE NORMAN GROUP MANAGER – BUDGET MANAGEMENT
Policy Framework and Procedure Rules:	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.
Executive Summary:	• The net revenue budget for 2024-25 was £360.671 million. The overall outturn at 31st March 2025 is a net under spend of £300,000 which has been transferred to the Council Fund. • This takes into account the establishment of a net £13.063 million of new earmarked reserves in 2024-25 to enable investment into services and facilities for residents and to mitigate future risks and expenditure commitments. • Total Directorate budgets provided a net over spend of £2.376 million and Council Wide budgets a net underspend of £15.128 million. • The outturn position also takes into account additional council tax income collected over budget of £611,000 during the financial year. • The overall under spend on the Council budget significantly masks underlying budget pressures in Additional Learning Needs services, Home to School Transport, and Children's social care. • The main reasons for the overall under spend in 2024-25 are:- ➤ Unanticipated Welsh Government grant of £3.290 million towards the teachers' pay award for 2024-25 and NJC pay pressures.

	➤ A £2.044 million saving from Council agreeing a change in the Minimum Revenue Provision Policy on 23 October 2024. ➤ Unanticipated Welsh Government grant of £2.024 million towards revenue cost pressures. ➤ Not needing to utilise the £1.558 million that was built into the Medium Term Financial Strategy 2024-28 towards emerging budget pressures and as a contingency against non-deliverability of budget reduction proposals. • The budget approved for 2024-25 included budget reduction proposals totalling £13.045 million. At 31st March 2025 there was a shortfall on the savings target of £1.569 million, or 12.03% of the overall reduction target. • During 2024-25 Directorates drew down funding from specific earmarked reserves. The final revenue draw down from reserves was £5.397 million.
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1. Purpose of Report

- 1.1 The purpose of this report is to provide the Committee with an update on the Council's revenue financial position for the year ended 31st March 2025.

2. Background

- 2.1 On 28th February 2024, Council approved a net revenue budget of £359.725 million for 2024-25 based on the provisional local government settlement received from Welsh Government (WG) in December 2023. The Welsh Government announced its final settlement on the 27th February 2024 which included an increase in the Revenue Support Grant (RSG) for the Council of £649,540 along with three grants transferring into the settlement totalling £296,723, increasing the net revenue budget for 2024-25 to £360.671 million. The reasons for this increase were outlined in a report to Council on 13th March 2024, but were mainly in respect of an additional £14.4 million (across Wales) included in the Final Local Government Settlement to support pressures in both social care and education, including teachers' pay.
- 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 March 2025

- 3.1.1 The 2024-25 financial year has continued to be a complex year in managing the Council's budget.

3.1.2 A significant number of grants were received in the last quarter of the financial year, the majority of which were unanticipated, including £2.637 million of Welsh Government revenue directorate grants and £3.358 million for schools, resulting in a change in the financial position between quarter 3 and quarter 4.

3.1.3 The most significant changes between quarter 3 and quarter 4 were:-

Directorate budgets

- Welsh Government revenue cost pressures grant - £2.024 million – allocated to Additional Learning Needs (ALN) services (£549K), Adult Social Care (£435K), Children's Services (£500K) and Home to School Transport (£540K)
- A £1.570 million reduction in the overall Insurance fund liability following a number of claims being repudiated or discontinued
- Rates rebate on Council buildings - £682,000
- Additional Welsh Government Homelessness Prevention grant - £254,000
- Additional Welsh Government ALN grant funding - £209,000
- Additional Welsh Government Afghan Resettlement grant - £198,000

Schools delegated budgets

- Additional Welsh Government School Standards grant - £1.594 million
- Welsh Government Teacher's pay and pension grant allocated to schools - £1.215 million
- Additional Welsh Government Reform ALN Coordinator grant - £234,000
- Additional Welsh Government Schools Causing Concern grant - £199,000

3.1.4 Given the changes that have occurred which have resulted in a better financial position at the end of 2024-25, the Council is able to earmark some of this funding to investments to support its residents. A more detailed review of Earmarked reserves is provided in section 4.4 of the report and **Appendix 4**.

3.1.5 The Council's net revenue budget and final outturn for 2024-25 is shown in **Table 1** below.

Table 1- Comparison of budget against actual outturn at 31st March 2025

Directorate/Budget Area	Original Budget 2024-25 £'000	Current Budget 2024-25 £'000	Final Outturn Q4 2024-25 £'000	Final Over / (Under) Spend 2024-25 £'000	Projected Over / (Under) Spend Qtr 3 2024-25 £'000
Directorate					
Education, Early Years and Young People	143,485	148,823	148,477	(346)	1,422
Social Services and Wellbeing	104,575	109,463	109,952	489	2,796
Communities	30,704	33,271	33,590	319	825
Chief Executive's	22,425	23,578	25,492	1,914	1,922
Total Directorate Budgets	301,189	315,135	317,511	2,376	6,965
Council Wide Budgets					
Capital Financing	7,052	6,907	1,351	(5,556)	(4,699)
Levies	9,635	9,645	9,549	(96)	(76)
Apprenticeship Levy	750	750	889	139	120
Council Tax Reduction Scheme	16,054	16,054	16,326	272	461
Insurance Premiums	1,363	1,363	(426)	(1,789)	(210)
Repairs & Maintenance	670	364	0	(364)	0
Pension Related Costs	430	430	465	35	41
Other Corporate Budgets	23,528	10,023	2,254	(7,769)	(9,389)
Total Council Wide Budgets	59,482	45,536	30,408	(15,128)	(13,752)
Net Council Tax Collection			(611)	(611)	0
Appropriations to Earmarked Reserves			13,063	13,063	0
Transfer to Council Fund			300	300	0
Total	360,671	360,671	360,671	0	(6,787)

3.1.6 The overall outturn at 31st March 2025 is a net under spend of £300,000 which has been transferred to the Council Fund, bringing the total Fund balance to £10.030 million. Total Directorate budgets provided a net over spend of £2.376 million and Council wide budgets a net under spend of £15.128 million. The outturn position also takes into account additional council tax income collected over budget totalling £611,000 during the financial year.

3.1.7 Further detail is provided on the more significant under and over spends and movements since quarter 3 in section 3.3.

3.1.8 The main financial pressures are in the service areas of Additional Learning Needs (ALN), Home to School Transport (HtST), and Children's Social Care.

3.1.9 The Schools additional learning needs budget benefitted from £549,000 additional Welsh Government grant to support revenue cost pressures during quarter 4, along with additional ALN grant funding of £494,000. There continues to be an increase in demand for ALN support at schools resulting in an over spend of £180,000 (£1.223 million if the one-off funding had not been received from Welsh Government). Council have approved a £1.330 million budget pressure for 2025-26 to mitigate the increased demand for ALN 1:1 support in schools.

- 3.1.10 There is an over spend on Home to School Transport (HtST) of £80,000. This is despite Council approving growth of £1.2 million in the 2024-25 budget to address increased costs being experienced following re-tenders, mainly as a consequence of a shortage of drivers and increased fuel costs, and £540,000 of funding allocated in quarter 4 from the WG cost pressure grant. The service has seen an increase in demand for transporting pupils individually due to challenging behaviour and an increase in Additional Learning Needs (ALN) pupils requiring transport provision based on the learner's needs assessment. The pressures have been partly mitigated by the introduction of price caps on in-year tenders resulting in a significant cost saving for the service area. Council have approved a £519,000 budget pressure for 2025-26 for the underlying increased learner transport costs.
- 3.1.11 A 3 year sustainability plan to improve outcomes for Children and Family Services was approved by Council on 20th September 2023, funded through a recurrent revenue budget growth of £3.5 million. Progress is being made with implementing the plan, particularly to progress the steady and safe reduction in the use of agency staff, through improved retention and recruitment of a permanent workforce, including a successful grow your own scheme and international recruits.
- 3.1.12 The outturn for Children's Services for 2024-25 is an over spend of £1.198 million, primarily due to an over spend of £3.699 million on the Care Experienced Children budget. Council have approved a budget pressure of £3.250 million for 2025-26 to mitigate the ongoing pressures of Care Experienced Children and insufficient numbers of foster carers.
- 3.1.13 There continues to be pressures in learning disabilities and physical disability/sensory impairment services driven by the complexity of need and demand across these services. The Social Services Improvement Board is overseeing a number of actions to address the pressures in the adult services budget, including accelerating the work to transform learning disabilities. Council approved £1.970 million towards the increased costs of home care for adults with learning disabilities and £1 million towards additional residential/nursing placement costs due to new admissions for older people and older people with mental health needs as part of the MTFS 2024-25 to 2027-28. Further actions for 2024-25 have been developed into a 3 year Plan for Sustainable Care and Support for Adults in Bridgend County Borough Council (BCBC) that was approved by Cabinet on 19th November 2024. This plan sits alongside the 3 year strategic plan for children and family services which was approved by Cabinet in September 2023. Council have approved budget pressures for 2025-26 of £1.282 million for learning disabilities services, £679,000 for mental health services and £540,000 for Physical Disability/Sensory Impairment services.
- 3.1.14 Going forward, there are increased pressures on council tax collection (see paragraph 3.3.6) and an increase in eligibility for council tax support through the Council Tax Reduction Scheme (see paragraph 3.3.5) due to the continuing cost of living crisis.

Budget virements/technical adjustments

3.1.15 There have been a number of budget virements and technical adjustments between budgets since the quarter 3 Revenue Forecast was presented to Cabinet in January 2025.

3.1.16 The main virements and technical adjustments since quarter 3 are outlined below:

Budget Virements

Service vired from / to	Amount
Transfer of funding from the Capital Financing budget to Directorate budgets in relation to the change in Minimum Revenue Provision Policy as approved by Council on 23 October 2024.	£50,241

Technical Adjustments

Service vired from / to	Amount
In-year transfer of funding for inflation	£117,928
Allocation of funding retained centrally in respect of Joint Negotiating Committee (JNC) pay award for 2024-25 for Youth and Community Workers – confirmed in December 2024.	£12,356
Allocation of corporately held funding for Feasibility works in line with spend	£170,439
Allocation of corporately held funding for Revenue minor works in line with spend	£135,656

Budget Reduction Proposals

3.2 Monitoring of Budget Reduction Proposals

Prior Year Budget Reductions

3.2.1 As outlined in previous monitoring reports during the year, there were still £415,000 of outstanding prior year budget reduction proposals that have not been met in full. Directors have been working to realise these savings during the 2024-25 financial year. The position at year end is summarised in **Appendix 1** with a summary per directorate provided in **Table 2**.

Table 2 – Outstanding Prior Year Budget Reductions

	Total Budget Reductions Required	Total Budget Reductions Achieved	Shortfall
DIRECTORATE /BUDGET REDUCTION AREA	£'000	£'000	£'000
Education, Early Years and Young People	40	40	0
Communities	375	85	290
TOTAL	415	125	290

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 £415,000 prior year proposals outstanding, £125,000 have been realised, leaving a shortfall of £290,000. Proposals still not achieved include:

- COM 2 2021-22 – Re-location of Community Recycling Centre from Tythegston to Pyle (£60,000). The new site in Pyle opened in quarter 4 of 2023-24. The timing of the opening meant that exit terms of the lease were being finalised in 2024-25. Once these have been finalised the full saving will be made.
- COM 4 2022-23 – Remove Business in Focus from running Enterprise Centres in Bridgend (£20,000). The review of the Business in Focus operating model to identify operating efficiencies is ongoing at the start of 2025-26. Any shortfall in the saving achieved in 2025-26 will be mitigated by savings within the wider Corporate Landlord service area.
- COM 5 2022-23 (£50,000) and COM3 2023-24 (£120,000) – Commercially let wings of Ravens Court to a partner organisation or business (£50,000). The building was not commercially let during 2024-25 however sale of the freehold took place in the final quarter of 2024-25 which will enable the savings to be realised in full going into 2025-26.
- COM 2 2023-24 – Charging Blue Badge Holders for parking (£40,000). The traffic management team were engaged in the introduction of the default national speed limit in built up areas in 2023-24. A staff member commenced work on this proposal in 2024-25 and it is currently at initial consultation stage. It requires a full order making process, which is typically 6-9 months.

Budget Reductions 2024-25

3.2.3 The budget approved for 2024-25 included budget reduction proposals totalling £13.045 million, which is broken down in **Appendix 2** and summarised in **Table 3** below. The year end position is that £11.476 million has been achieved, leading to an overall shortfall on the savings target of £1.569 million, or 12.03% of the overall reduction target.

Table 3 – Monitoring of Budget Reductions 2024-25

	Total Budget Reductions Required	Total Budget Reductions Achieved	Shortfall
DIRECTORATE /BUDGET REDUCTION AREA	£'000	£'000	£'000
Education, Early Years and Young People	1,560	1,269	291
Schools	3,441	3,441	0
Social Services and Wellbeing	2,248	1,891	357
Communities	2,460	2,311	149
Chief Executive's	3,246	2,474	772
Corporate/Council Wide	90	90	0
TOTAL	13,045	11,476	1,569

3.2.4 The most significant (> £100,000 shortfall) budget reduction proposals not achieved in full are:-

- EDFS9 – Cessation of Adult Community Learning provision (£149,000). The shortfall is due to the timing of the required restructure with the consultation process finalised during quarter 3. Savings will be achieved in full from 2025-26.
- EDFS19 – Communications and Relationships Team (£142,000). Saving not met in 2024-25 due to the overall increase in the number of pupils needing the service. Consultation is due to start soon with the outcome of the consultation determining next steps.
- SCH1 – Efficiency saving against School Delegated Budgets – 3% in 2024-25 (£3.441 million). Saving is referenced as having been achieved due to the overall reduction in Individual Schools Budget (ISB), however as referenced in 3.3.1, the reduced budgets have resulted in an overall deficit balance for schools at year end of £619,000. Close monitoring of school budgets will continue in 2025-26 with a further 1% efficiency saving to be achieved on school delegated budgets and officers continue to work with schools to bring this overall deficit down.
- SSW13 – Council to reduce its investment into cultural services (£360,000). There was a shortfall of £295,000 against the proposal in 2024-25. On 14th May 2024 Cabinet approved a £50,000 reduction to the book fund and removal of the £15,000 subsidy for the Youth Theatre. Cabinet also approved public engagement over how future savings can be achieved and further reports will be presented to Cabinet to enable the outcome of consultation exercises to be taken into account when finalising any proposed changes. The service will also continue to maximise grant funding opportunities throughout 2025-26.
- CEX22 – Review of ICT Services (£398,000). There was a shortfall of £339,000 against this proposal in 2024-25. Further work is to be carried out on a review of the telephony budgets across the Council following a re-procurement exercise, with the full saving anticipated to be met in 2025-26.

3.2.5 **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. Directors continue to work with their staff to deliver their proposals or alternatives and this is reflected in the forecast outturn for the year.

- 3.2.6 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. It has not been used in 2024-25 to mitigate shortfalls as service areas were committed to identifying alternative one-off under spends in the service areas affected. This approach has also enabled the MTFS Budget Reduction Contingency reserve to be maintained for 2025-26 where the level of savings required to be made is £8.379 million.

3.3 Commentary on the financial position at 31st March 2025

Financial position at 31st March 2025

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, Early Years and Young People Directorate**

The net budget for the Education, Early Years and Young People Directorate for 2024-25, including school delegated budgets, was £148.823 million and the actual outturn was £148.477 million, following draw down of £577,000 from earmarked reserves, resulting in an under spend of £346,000.

The main variances are:

EDUCATION, EARLY YEARS AND YOUNG PEOPLE DIRECTORATE	Net Budget	Projected Outturn	Projected Variance Over/(under) budget	% Variance
	£'000		£'000	
Learner Support	6,991	7,263	272	3.9%
Early Years and Young People	2,939	2,411	(528)	-18.0%
Home to School Transport	10,929	10,849	(80)	-0.7%
Catering	1,806	1,145	(661)	-36.6%

Schools' delegated budgets

Total funding delegated to schools in 2024-25 was £126.445 million (including Post-16 grant funding of £7.736 million).

The schools' delegated budget is reported as balanced in any one year as any under spend or over spend is automatically carried forward, in line with Welsh Government legislation, into the new financial year before being considered by the Corporate Director – Education, Early Years and Young People in line with the requirements for managing surplus and deficit balances as set out in the Financial Scheme for Schools.

The year-end position for 2024-25 was:-

- Net overall school balances totalled £2.405 million at the start of the financial year. During 2024-25 school balances decreased by £3.023 million to a negative balance of £619,000 at the end of the financial year. Whilst this is an improved outturn position from the projected deficit of £4.989 million reported at quarter 3, it is the first time the Council has ended the financial year with an overall net deficit balance. The position would have been worse if we had not received additional grant funding of £3.358 million from Welsh Government in the final quarter of 2024-25 and maximised existing grant funding for schools at year end (£847,000).
- Out of a total of 59 schools, there are 31 schools with a deficit balance (26 primary, 4 secondary and 1 special school) and 18 schools (14 primary and 4 secondary) that have balances in excess of the statutory limits (£50,000 primary and £100,000 for secondary and special schools) in line with the School Funding (Wales) Regulations 2010. These balances will be analysed in line with the Council's agreed 'Guidance and Procedures on Managing Surplus School Balances'.
- Council approved an MTFs efficiency savings target against School Delegated Budgets of 1% in 2025-26, with an indicative 1% for 2026-27 and 2027-28. The 1% target in 2025-26 equates to £1.186 million, therefore the school delegated budgets will require close monitoring throughout 2025-26. The Financial Scheme for Schools requires schools to obtain permission from both the Corporate Director – Education, Early Years and Young People and the Section 151 Officer to set a deficit budget. Schools with deficits of greater than £50,000 in a primary school or greater than £150,000 in a secondary or special school are requested to attend termly support and challenge meetings with senior Local Authority officers. In addition, any unplanned deficits that occur within the financial year due to unforeseen circumstances must be reported as soon as they become known to the school.
- A summary of the position for each sector and overall for 2024-25 is provided below:-

	Balance brought forward	Funding allocated in 2024-25	Total Funding available	Actual Spend	Balance at year end
	£'000	£'000	£'000	£'000	£'000
Primary	283	54,386	54,669	55,413	(744)
Secondary	2,588	58,688	61,276	60,925	351
Special	(466)	13,370	12,904	13,130	(226)
Total	2,405	126,444	128,849	129,468	(619)

Central Education, Early Years and Young People (EEYYP) Directorate budgets

The under spend for 2024-25 for the Central Education, Early Years and Young People Directorate was £346,000. This is compared to a projected over spend position of £1.325 million at quarter 3. The main reason for the improved position in ALN services is due to the allocation of £549,000 of Welsh Government grant funding to support revenue cost pressures and an additional £494,000 ALN funding received since quarter 3. The improved position in Home to School Transport is due to the allocation of £540,000 from the Welsh Government grant funding to support revenue cost pressures. Without this additional one-off funding, the Directorate would have over spent by £1.237 million.

Learner Support Group

- There is a net over spend of £272,000 in Learner Support Group budgets, which has improved by £849,000 from the projected net over spend of £1.121 million at quarter 3.
- The Schools additional learning needs budget benefitted from £549,000 additional Welsh Government grant to support revenue cost pressures during quarter 4, along with additional ALN grant funding of £494,000.
- There continues to be an increase in demand for ALN support at schools resulting in an over spend of £180,000 (£1.223 million if the one-off funding had not been received from Welsh Government). The underlying over spend remains in the areas of sensory support and communication, complex medical needs, and relationship support. The number of pupils supported in these three areas in 2022-23 was 174, increasing to 277 in 2023-24, further increasing to 302 in the summer term, 340 in the autumn term and 364 in the spring term of 2024-25.
- Council have approved a £1.330 million budget pressure for 2025-26 to mitigate the increased demand for ALN 1:1 support in schools.
- The directorate has been proactive in devolving funding to schools to prevent the use of agency costs for 1:1 support. 19 pupils were supported in the autumn term and 18 in the spring term. This is in addition to 5 pupils in Heronsbridge and 19 pupils in Ysgol Bryn Castell. It is estimated that the preventive costs of this approach equated to £715,571 in 2024-25.
- The inter-authority recoupment budget over spent in 2024-25 by £167,000. There continues to be an increase in demand for Bridgend pupils to use out-of-county placements as there were insufficient spaces at Heronsbridge School and Ysgol Bryn Castell. Out-of-county placements initially reduced from 21 (spring 2024) to 19 in the summer term, and then there was a further reduction to 14 in the autumn term, but this increased to 21 in the Spring term 2025.
- There was a projected £200,000 over spend on the Adult Community Learning budget at quarter 3 which was primarily due to the shortfall on the MTFS saving of £149,000 against the service. The shortfall was due to the timing of the finalised restructure which took place in November 2024. In quarter 4, due to maximisation of grant funding, the over spend reduced to £56,000. The MTFS saving will be made in full in 2025-26.
- The Education Other Than at School budget had an under spend of £97,000, mainly due to staff vacancies.

Early Years and Young People Group

- There is an under spend of £528,000 which has improved by £320,000 from the projected under spend of £208,000 reported at quarter 3.
- The quarter 3 under spend primarily related to a restructure within the Education Welfare Service (£136,000) combined with staff vacancies being held across the Bridgend Youth Service and Education Engagement Team budgets. These posts are being recruited to in 2025-26.
- The improved position is primarily due to additional grant funding - Local Authority Standards Early Years Non-maintained Settings (£49,000), Local Authority Reform ALN (£14,000), Whole School grant (£230,000), Attendance grant (£130,000) and Youth Endowment Fund (YEF) (£14,000) and maximisation of grant funding (Youth Justice Board (£23,000), YEF (£36,076) and Whole School grant (£54,000) in quarter 4.
- Council approved a budget pressure of £141,000 for 2025-26 to assist the youth justice service to reduce youth offending and provide vital support to young people affected by trauma.

Home-to-school transport (HtST)

- Council approved a £1.2 million budget pressure for 2024-25 as part of the Medium Term Financial Strategy to address the increased HtST costs experienced in 2023-24.
- Despite this budget growth in 2024-25, further retendering exercises in September 2023 resulted in additional costs of £572,000 on HtST budgets in 2024-25.
- The service has also seen an increase in demand for transporting pupils individually due to challenging behaviour and an increase in pupils with ALN requiring transport provision based on the learner's needs assessment. Along with a number of contractors handing back contracts and having to re-tender at higher cost, these pressures have added a further increase in costs in 2024-25 of £244,000.
- These pressures were partly mitigated due to in-year tenders being issued with a price cap resulting in a significant cost saving for the service area, which saw the overall projected over spend decreasing from £1.277 million at quarter 1 to £571,000 at quarter 3.
- The improved position at year end to an overall under spend on the HtST budgets of £80,000 is primarily due to £540,000 of funding being allocated in quarter 4 from the WG cost pressures grant. Without this one-off funding the service would have been over spent by £460,000.
- Council has approved a budget pressure of £539,000 for HtST for 2025-26 as part of the MTFS.

Catering Services

- There is an under spend of £661,000 on catering services in 2024-25. This is primarily due to the continued roll out of the Universal Primary Free School Meals (UPFSM) by Welsh Government and the accompanying grant funding to support the initiative.
- The second half of 2024-25 saw a significant increase in the number of UPFSM provided with year 6 being introduced to the scheme from September onwards which positively impacted on the outturn position. 397,171 meals were served in the first six months, increasing to 624,765 in the last six months of 2025-26.
- The service also benefited from an administration element of the grant (£85,196).
- The provision of UPFSM in 2025-26 will continue to be monitored closely to determine whether the positive outturn position achieved in 2024-25 could be proposed as a future MTFS budget reduction proposal.

Historic pension and redundancy costs

- The £736,000 over spend is primarily due to the cost of redundancies in schools being met centrally where they met current or future MTFS savings targets.
- In 2024-25 10 Primary schools were supported with 23 redundancies (£540,000) and 2 secondary schools were supported with 7 redundancies (£259,000)
- There has been a small offsetting reduction in these costs from historic employee pension costs – there will be an incremental reduction each year as members pass away.

3.3.2 Social Services and Wellbeing Directorate

The net budget for the Directorate for 2024-25 was £109.463 million and the actual outturn was £109.952 million following draw down of £1.512 million from earmarked reserves, resulting in an over spend of £489,000. This is compared to a projected over spend position of £2.796 million at quarter 3. The main reasons for the reduction in the over spend include a number of one-off grants awarded since quarter 3 and maximisation of existing grants across the service including WG grant to support additional revenue cost pressures (£935,000), Children and Communities grant (£349,000), Housing Support grant (£265,000), 50 Day Winter Challenge grant (£428,000) and a further £176,000 of Shared Prosperity Funding (SPF). Without this additional funding, the Directorate would have over spent by £2.642 million.

The most significant variances for the directorate are:

SOCIAL SERVICES AND WELLBEING DIRECTORATE	Net Budget	Actual Outturn	Actual Variance Over/(under) budget	% Variance
	£'000	£'000	£'000	
Adult Social Care	72,730	72,541	(189)	-0.26%
Prevention and Wellbeing	6,547	6,027	(520)	-7.94%
Childrens Social Care	30,186	31,384	1,198	3.97%

Adult Social Care

There is a net under spend of £189,000 on the Adult Social Care budget, an improvement of £938,000 from the £749,000 over spend projected at quarter 3.

The most significant variances contributing to the under spend are:

ADULT SOCIAL CARE	Actual Variance Over/(under) 2024-25 £'000
Mental Health Homecare	559
Learning Disabilities Residential Care	448
Physical Disability/Sensory Impairment Home Care	312
Older People Direct Payments	193
Physical Disability/Sensory Equipment	195
Learning Disabilities Homecare	172
Learning Disabilities Day Opportunities	171
Older People Supported Accommodation	163
Physical Disability/Sensory Impairment Residential Care	100
Homes for Older People	72
Mental Health Supported Accommodation	(193)
Assessment and Care Management	(194)
Learning Disabilities Direct Payment	(364)
Older People Home Care	(1,199)

- Mental Health Homecare – this includes supported living, short breaks and domiciliary care, with the service experiencing increased needs of people with supported living packages of care. There has been a slight reduction in the over spend reported at quarter 3, from £579,000 to £559,000 at quarter 4. A budget pressure of £697,000 has been approved by Council for 2025-26 to mitigate this pressure.
- Learning Disabilities Residential Care – there is an over spend of £448,000, which is comparable to the £454,000 over spend projected at quarter 3. The underlying reason for the over spend is increased costs for existing placements within the residential and nursing service due to changing needs. A budget pressure of £438,000 has been approved by Council as part of the MTFS for this service for 2025-26.
- Physical Disability/Sensory Impairment Home Care - there is an over spend of £312,000, which has increased from the £167,000 projected over spend at quarter 3. Following clarification of terms and conditions of funding, £107,000 of one-off grant from the 50 Day Winter Challenge Funding originally allocated against this service area in quarter 3, has now been moved to Older People services. The over spend is based on the current demand for the service, which is 100 packages of support at the end of March 2025. A budget pressure of £274,000 has been approved by Council as part of the MTFS for 2025-26 to mitigate this pressure.
- Older People Direct Payments – there is an over spend of £193,000 across the Direct Payments budgets in this area. The main reason for the over spend is the increasing complexity of cases that impact on the average cost of direct payments support. The over spend has reduced by £101,000 since quarter 3 due to further packages being removed from projections where activity had ceased for longer than six months, along with increases in account reimbursements received. A budget pressure of £369,000 has been approved by Council as part of the MTFS for 2025-

26 with ongoing close monitoring of account reimbursements to ensure the full budget pressure is required.

- Physical Disability/Sensory Equipment – there is an over spend of £195,000, a reduction of £42,000 from the quarter 3 projected over spend of £237,000. The over spend is partly due to an increase in the expected contribution to the community equipment pooled fund (£84,000) with the remainder being due to increases in demand for small works and adaptations and aids to daily living. This is a fluctuating demand led budget which varies month by month and for which a budget pressure of £266,000 has been approved by Council for 2025-26.
- Learning Disabilities Homecare – there is an over spend of £172,000, compared to the projected over spend of £218,000 at quarter 3. While the over spend is mainly due to increases in staffing costs for the internal Homecare service due to having to cover staff sickness (£243,000), this is partly offset by under spends in the external Homecare service (£56,000). A budget pressure of £325,000 has been approved by Council for 2025-26.
- Learning Disabilities Day Opportunities - the over spend of £171,000 has reduced by £488,000 since quarter 3. This is due to additional Welsh Government revenue cost pressure grant awarded since quarter 3 of £435,000. Without the additional grant income, the over spend would have been £530,000. The over spend relates mainly to placement numbers exceeding the available budget for external day services in addition to increased transport costs (£157,589) which remain at a comparable level to quarter 3. The underlying reason for the over spend continues to be that whilst the learning disabilities home care budget continues to over spend as people have not returned to internal day services, older people are taking up the vacant day services placements. The service cannot be reduced until alternative models of day time support and occupation have been developed following a review which is underway. The new transport policy was approved by Cabinet in April 2025 and went live on 1st May 2025 which should impact positively on the increased transport costs incurred in 2024-25. A £438,000 budget pressure has been approved by Council for 2025-26 for this service as part of the MTFS.
- Older People Supported Accommodation – there is an over spend of £163,000 compared to a projected over spend of £190,000 at quarter 3. This over spend is based on the current demand for the service. For 2025-26 a budget pressure of £201,000 has been approved by Council as part of the MTFS.
- Physical Disability/Sensory Impairment Residential care – there is an over spend of £100,000 which is comparable to the projected over spend of £109,000 at quarter 3. The overspend is due to higher placement numbers than budget.
- Homes for Older People – There is an overspend of £72,000 compared to a projected under spend of £524,000 at quarter 3. The over spend is mainly due to increased residential/nursing placement costs which has increased by £678,000 since quarter 3.
- Mental Health Supported Accommodation – The under spend of £193,000 primarily relates to under spends on staffing budgets. The under spend is comparable to the projected underspend at quarter 3, which was mainly due to staff vacancies being held for the short term.

- Assessment and Care Management – there is a under spend of £194,000 on directorate wide assessment and care management budgets, an increase from the quarter 3 projected under spend of £69,000. Since quarter 3 there has been a reduction in staffing costs of £80,000 plus an additional £52,000 grant received due to maximisation of grants – including the 50 day Winter challenge, Social Care Workforce grant and Integration and Rebalancing Care funding. There continues to be a need for agency cover across this area due to demands in the system particularly linked to supporting the acute hospital and timely discharges and the complexity of court protection work in learning disabilities. A plan to permanently recruit and step down agency in a timely way is being implemented.
- Learning Disabilities Direct Payments – there is a under spend of £364,000 across the Direct Payments budgets in this area compared to a projected under spend of £58,000 at quarter 3. Detailed reviews are being undertaken of all direct payment cases, with packages being removed from projections where support has ceased for longer than six months. Account reimbursements have also exceeded budget.
- Older People Home Care – There is a under spend of £1.119 million, an increase from the quarter 3 projected under spend of £852,000. Since quarter 3, this area has received £336,000 of additional grant income, mainly £298,000 of the Welsh Government 50 day Winter Challenge funding. The under spend still primarily relates to under spends on staffing budgets as a result of the remodelling of the Support at Home services into locality based areas and the increase in numbers of people supported through short term reablement packages. Agency staff have been utilised to supplement the workforce where available. However, this has been offset by an over spend on external domiciliary care placements due to complexities of people's needs and increased packages of support.

Prevention and Wellbeing

- There is an overall under spend of £520,000 within Prevention and Wellbeing. This has increased by £131,000 since quarter 3. The underspend is mainly due to maximisation of grant funding from the Shared Prosperity Fund (£427,000) and other smaller grants across the service (£80,000).
- The following MTFS savings were not fully achieved in 2024-25:
 - SSW7 – review opportunities to amend the current energy payment arrangements for the leisure contract - £45,000 shortfall.
 - SSW13 – Council to reduce its investment into cultural services - £295,000 shortfall. While the saving was only partly achieved the shortfall was mitigated with Shared Prosperity funding so that the saving was met in the short term. Further reports will be presented to Cabinet to enable the outcome of consultation exercises to be taken into account when finalising any proposed changes to investment into cultural services to meet the MTFS saving.

Children's Social Care

There is a net over spend of £1.198 million on the Children's Social Care budget which is a decrease on the projected net over spend of £2.436 million at quarter 3. The improved position is due primarily to the additional one off grant funding received in quarter 4 - Welsh Government revenue cost pressure (£500,000) and maximisation of Housing Support grant (£169,000).

The most significant variances contributing to this over spend are:-

CHILDREN'S SOCIAL CARE	Actual Variance Over/(under) 2024-25 £'000
Care Experienced Children	3,699
Commissioning & Social Work	(855)
Early Help & Edge of Care	(828)
Other Child & Family Support Services	(387)
Family Support Services	(260)
Management and Admin	(172)

- The over spend of £3.699 million for Care Experienced Children is due to a combination of factors:-
 - The Independent Residential Care budget has an over spend of £3.326 million which has decreased by £369,000 since quarter 3. The over spend is based on the number of care experienced children in independent residential placements which is currently 24 placements (including 38 week residential and Operating Without Registration (OWR) placements), an increase of 1 since quarter 3. The underlying over spend position is due to the number in independent residential placements exceeding the budget which covers between 6-8 placements depending on the unit cost. In addition there continues to be insufficient in-house foster carer placements to meet needs and children requiring specialist provision, sometimes with high staffing ratios to keep them safe and protected. It should be noted that this budget area can be volatile and small changes in demand can result in very high costs being incurred. Since quarter 3 there has been additional one off revenue grant awarded from WG to support additional cost pressures of £500,000, plus an additional £136,000 of Social Care Workforce Grant. Without these grants the over spend would have been £3.962 million. Council approved £3.250 million budget pressure for 2025-26 as part of the Medium Term Financial Strategy, to address ongoing pressures of Care Experienced Children and insufficient numbers of foster carers.
 - There is an over spend of £8,938 on the Independent Fostering Agency (IFA) budget, compared to the quarter 3 projected underspend of £135,000. The reason for the move to an over spend position is an increase of 3 placements since quarter 3. This is due to alternative, lower cost, placement options being fully utilised, including Special Guardianship Orders. It should be noted, however, that some of the children in costly independent residential provision would ideally be with foster carers who can manage complex

needs. There is insufficient capacity in-house and in IFAs which means that some children's needs are being met in a higher, more expensive, tier of service.

- Children's Internal Residential Care has an over spend of £220,000, which is an increase of £32,000 since quarter 3. This is due to increased usage of agency workers to address safeguarding issues which require additional staffing across the service. Since quarter 3, £72,000 additional Eliminating Profit grant has been awarded specifically for the Hillsboro residence.
 - Other Looked After Children's Services has an over spend of £167,000, which is a decrease of £245,000 from the projected over spend of £411,00 at quarter 3 due to maximisation of the Housing Support Grant in quarter 4 (£198,000).
- Commissioning and Social Work – There is an under spend of £855,000 which has improved since the quarter 3 projected under spend of £678,000. The increase in under spend is mainly due to additional grant funding being received - Shared Prosperity Fund (£83,000) and Eliminating Profit grant (£107,000). There has also been a reduction in spend on agency staff by £39,000. In addition, there has been further reductions in staffing costs due to the current vacancies across the service (£94,000).

There remains an over spend in care and support and placement costs across the service area of £215,000 – this has reduced from the projected over spend of £338,000 at quarter 3. The majority of the over spend relates to Care Experienced Children/care support spend such as court mandated drug testing, assessments, reports, travel and therapy costs over which the service has no discretion but to secure against a very limited budget.

- Early Help & Edge of Care – During quarter 3, £1.773 million of the Early Help Services budget was transferred from EEYYP to the SSWB directorate in line with the 3 year sustainability plan approved by Council to improve outcomes for Children and Family Services in Bridgend. £500,000 of this budget related to a budget pressure approved by Council in February 2024 to strengthen the Council's statutory safeguarding accountabilities, specifically for Early Help and Edge of Care. At quarter 3 there was a projected under spend of £266,000 against this budget pressure as a review of the service is currently underway. In addition, during quarter 4 additional Regional Integration Funding was received (£81,000) and the Children and Communities grant was also maximised (£382,000), increasing the under spend at year end to £828,000.
- Other Child & Family Support Services – There is a under spend of £387,000 which is due to reduced costs for the Regional Adoption service based on current placements made across the region.
- Family Support Services has an underspend of £260,000 compared to a projected under spend of £134,000 at quarter 3. Direct payment reimbursements during 2024-25 have exceeded budget.
- Management & Administration – there is an under spend of £172,000 which is comparable to what was reported at quarter 3. The underlying under spend is primarily due to other staff vacancies in this service area which are contributing to the 2024-25 MTFS vacancy management factor of £255,000 for the SSWB directorate.

3.3.3 Communities Directorate

The net budget for the Directorate for 2024-25 was £33.271 million and the actual outturn was £33.590 million following draw down of £1.771 million from earmarked reserves, resulting in an over spend of £319,000. This is compared to a projected over spend position of £825,000 at quarter 3. The main reason for the reduction in over spend since quarter 3 is a one-off rates rebate within Corporate Landlord (£682,000) and maximisation of SPF grant (£182,000).

The main variances are:

COMMUNITIES DIRECTORATE	Net Budget £'000	Actual Outturn £'000	Actual Variance Over/(under) budget £'000	% Variance
Fleet Services	180	744	564	313.33%
Highways Services (DSO)	3,366	3,768	402	11.94%
Waste Collection & Disposal	11,181	11,385	204	1.82%
Planning and Development	706	871	165	23.37%
Strategic Regeneration	962	745	(217)	-22.56%
Economy, Natural Resources and Sustainability	1,489	1,242	(247)	-16.59%
Corporate Landlord	3,355	2,830	(525)	-15.65%

Fleet Services

- There is an over spend of £564,000 on Fleet Services which is slightly worse than the £500,000 projected over spend at quarter 3.
- As previously reported 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 have been further impacted by long term sickness and ongoing difficulties with recruitment and retention. A market supplement has been introduced for HGV technicians, in line with the corporate Market Supplement Policy, following comparisons with neighbouring authorities, which has only seen limited success in filling vacancies. A review outlining options for service operating models to mitigate the budget position of fleet services had been delayed due to officer availability but is now proceeding.

Highways Services

- The over spend of £402,000 is partly due to storm damage costs incurred in responding to Storm Bert and Darragh (£160,000). Transport costs have also been higher (£150,000) due to the service having to hire vehicles on a short term basis whilst consideration was given to longer term capital purchases. On 12 March 2025, Council approved a capital budget of £1.2 million to be included in the Capital programme, to be funded from prudential borrowing, to enable the Fleet Replacement Programme to continue.

Waste Collection and Disposal

- There is a net over spend on the Waste Collection and Disposal budget of £204,000 which has improved marginally from the net projected over spend of £216,000 reported at quarter 3. The main underlying pressures on the waste budget include:-

- The continued delay in the achievement of the 2022-23 MTFS saving, COM 2 – Relocation of Community Recycling Centre from Tythegston to Pyle resulting in cessation of lease payments at the existing site. Whilst the new site opened in quarter 4 of 2023-24 the timing of the opening meant that the full saving could not be achieved in 2024-25 as the exit terms of the lease needed to be finalised (£60,000 shortfall).
- Increase in subscribers for the Absorbent Hygiene Products (AHP) service. The AHP service has been promoted to further improve the recycling levels achieved in Bridgend which also mitigates the risk of fines imposed by WG if local authorities do not meet their recycling targets. It has seen an increase of 35% since the start of the 2022-23 financial year. Council have approved a £66,000 budget pressure for the AHP service for 2025-26.
- Decrease in income due to the reduction in the price of recycled materials since quarter 2 (£42,000).
- Shortfall of £129,000 on Trade Waste black bag income due to increased recycling being undertaken by businesses due to the change in law in Wales in April 2024 for all businesses, charities and public organisations to sort their waste for recycling.

Planning and Development

- The over spend of £165,000 is primarily due to a downturn in planning application income. Fee income is subject to considerable fluctuations between years, depending on number and types of applications.

Strategic Regeneration

- The under spend of £218,000 has improved since the projected under spend of £86,000 reported at quarter 3. This is primarily due to maximisation of SPF grant funding (£53,000), and additional Welsh Government Transforming Towns grant (£29,000) with the remainder due to ongoing staff vacancies.

Economy, Natural Resources and Sustainability

- The under spend of £247,000 has improved since the projected under spend of £98,000 reported at quarter 3. This is primarily due to maximisation of SPF grant funding (£129,000) and an under spend on non-staffing budgets (£40,000).

Corporate Landlord

- There is a net under spend of £525,000 against Corporate Landlord which has improved from the projected over spend of £252,000 reported at quarter 3.
- The main reason for the improved position is a one-off rates rebate on Council buildings of £682,000 due to backdated revaluations undertaken by the Valuation Office Agency. Without the rebate, Corporate Landlord would have over spent by £157,000 in 2024-25.
- There continues to be shortfalls in income (£405,000) generated from properties run by the Council that relate to occupancy shortfalls which have continued into 2024-25.
- The shortfall against Bridgend Market of £253,000 is due to the identification of Reinforced Autoclaved Aerated Concrete (RAAC) and the subsequent closure of the market and loss of rental income.
- There is also a shortfall in income of £146,000 for the Innovation Centre.
- Council approved a budget pressure of £405,000 for 2025-26 to address shortfalls in income on the property portfolio as part of the MTFS.

- As noted in section 3.2.2 the £50,000 target for 2022-23 and the £120,000 target for 2023-24 in relation to MTFS proposals to seek to commercially let out wings of Ravens Court were not achieved. In addition, there was a further £73,000 MTFS saving across the estate budgets for 2024-25 in relation to office rationalisation which has also not been achieved. The shortfall against the savings targets added a further £243,000 pressure on the Corporate Landlord estates' budget in 2024-25.
- Corporate Landlord sold the Freehold of Ravens Court in the final quarter of 2024-25 which will mitigate these MTFS shortfalls going into 2025-26.
- The over spend in Corporate Landlord has been partially mitigated in 2024-25 by staff vacancies of £230,000.

3.3.4 **Chief Executive's**

The net budget for the Directorate for 2024-25 was £23.578 million and the actual outturn was £25.492 million following draw down of £1.537 million from earmarked reserves, resulting in an over spend of £1.914 million. This is comparable to the projected over spend of £1.922 million reported at quarter 3. Since quarter 3 there has been additional grant funding confirmed for ICT Connecting Care grant (£304,000) and Housing and Homelessness (Ukrainian grant - £255,000 and Afghan Resettlement grant - £198,000). Without this additional funding, the Directorate over spend would have been £2.671 million.

The main variances are:

CHIEF EXECUTIVE'S	Net Budget £'000	Actual Outturn £'000	Actual Variance Over/ (under) budget £'000	% Variance
ICT	4,074	4,786	712	17.5%
Legal, Democratic & Regulatory	5,851	6,194	343	5.9%
Housing & Homelessness	3,552	3,826	274	7.7%
Partnerships	2,275	2,502	227	10.0%
Finance	4,076	4,300	224	5.5%

ICT

- There is an over spend of £712,000 across ICT budgets which has increased by £420,000 since quarter 3.
- The over spend is primarily due to the shortfall of £339,000 against the MTFS saving CEX 22 – Review of ICT services. The full saving is anticipated to be met in 2025-26 due to a re-procurement exercise that has been undertaken on telephony services. An exercise is due to be undertaken based on the outturn position of service department telephone budgets to permanently re-align budgets which will partly mitigate the over spend in ICT in 2025-26.
- In addition, 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 is due to be undertaken based on the outturn position of service department print budgets to permanently re-align budgets which will further mitigate the over spend in ICT in 2025-26.

- There has been additional one-off grant income received from WG in quarter 4 to support the replacement costs for the WCCIS system project called Connecting Care (£304,000). Without this grant the ICT over spend would have been £1.016 million.

Legal

- There is an over spend of £343,000 across Legal, Democratic and Regulatory services, which has reduced by £274,000 since quarter 3.
- There is an over spend on staffing budgets within Legal services of £98,000, which is partly due to the timing of the implementation of the MTFS proposal CEX13 – restructure of Legal Services (£60,000) and also due to use of agency staff to cover vacant posts across the service.
- The Registrars service has an over spend of £34,000 due to the MTFS saving proposal CEX12 being partly achieved (£28,000 shortfall) due to a reduction in the number of ceremonies delivered in 2024-25.
- Regulatory Services (Licencing, Public Health) has an over spend of £92,000 which has reduced since the quarter 3 projected over spend of £142,000. This over spend is primarily due to the under recoupment of income for taxi examination, licence fees and environmental health recharges (£68,000). Whilst a similar shortfall was experienced in 2023-24 it was offset by a £74,000 refund being received in relation to the Shared Regulatory Service.
- The balance of the over spend is due to legal fees. Whilst Council approved £300,000 in 2024-25 to support the increase in legal fees being experienced, the complex cases requiring King's Counsel have continued. Council has approved a further budget pressure of £200,000 for 2025-26, as part of the MTFS to address ongoing pressures on litigation cases.

Housing & Homelessness

- There is a net over spend of £274,000 on Housing & Homelessness which is a reduction of £136,000 compared with the projected over spend of £411,000 reported at quarter 3.
- The overall budget for housing and homelessness was reduced by £645,000 in 2024-25 due to MTFS budget reduction proposals. **Appendix 2** highlights that all of these were achieved in 2024-25.
- For 2024-25, Welsh Government (WG) initially provided grant funding of £915,000 for accommodation under the “No One Left Out” funding stream, £198,000 under a Discretionary Homelessness Prevention Grant, £60,000 Strategic Coordinator grant and £86,000 Ukrainian grant. During quarter 4 WG increased the Ukrainian grant funding by £255,000. The total revised grant funding confirmed from WG for housing and homelessness services for 2024-25 was £1.514 million which is comparable to the total grant allocation of £1.505 million received in 2023-24. £1.369 million of the grant funding covers homelessness accommodation costs and £145,000 is utilised towards Homeless Spend to Save support, e.g. funding bonds for rental properties.
- Spend on Homelessness accommodation for 2024-25 was £4.3 million, a reduction of £100,000 since the £4.4 million projected at quarter 3. The key factor in this reduction is the purchase of Houses in Multiple Occupation (HMO) stock as well as utilising an existing BCBC property with the opening of Maple Tree House (previously Children's Residential Home), enabling a reduction in the use of more expensive options such as tourism style properties.
- As well as the core budget (£2.174 million) and total WG accommodation grant funding (£1.514 million), the service has also seen an increase in rental income

relating to Housing Benefits claimed by tenants who have been supported with homelessness accommodation (£519,000). The net impact is an overall under spend on accommodation in 2024-25 of £93,000.

- The Council has seen a significant increase in the provision of temporary accommodation. At the end of 2019-20, the Council was providing temporary accommodation to 83 households. At the end of March 2025 this had increased to 261 households, representing a 214% increase over this period. The wider demand for social housing from those in housing need has also increased. At the end of 2019-20 there were 816 households registered on Bridgend's Common Housing Register. At the end of March 2025 this number had increased to 3,284 households.
- Due to the uncertainty of levels of WG grant funding going forward, Council approved a £400,000 budget pressure for Housing and Homelessness for 2025-26 as part of the MTFS.
- There is an over spend of £756,000 on Disabled Facility grants. This over spend has increased by £530,000 since quarter 3 due to a revenue contribution to capital to fund an over spend on capital works due to the high number of schemes completed in 2024-25. This has been offset by under spends on the Brynmenyn Homeless Centre (£129,000) due to an increase in Housing Benefit income levels, staff vacancies (£40,000), maximisation of Supporting People grant (£82,000) and additional grant funding received during quarter 4 from the Home Office for the Afghan Resettlement scheme (£198,000).

Partnerships

- There is an over spend of £227,000 in Partnerships. This is mainly due to MTFS saving proposals for 2024-25 not being fully achieved.
- CEX 8 Charging for PEST control services – shortfall of £32,000. This is due to a reduced uptake of the service which has resulted in a reduction in income received for 2024-25.
- CEX 23 Review the provision of Partnerships and Customer Services shortfall of £61,000 due to delays in confirmation of alternative funding for two posts.
- The remainder is due to an over spend in the Community Safety Partnerships team due to additional staffing costs to support the Assia Domestic Abuse Service team (£77,000).

Finance

- There is a net over spend of £224,000 across Finance, a reduction of £27,000 since quarter 3. The over spend is primarily due to a reduction in court cost income and a shortfall in the Department for Work and Pension (DWP) subsidy contributions towards housing benefit payments in Bridgend. Any Housing Benefit award paid over the subsidy level is borne by the Council as the DWP does not fully fund all Housing Benefit expenditure – for example there are a number of tenancy arrangements whereby the subsidy is limited to historic local housing allowance rates or restricted by rent officer determinations. Council have approved a budget pressure of £158,000 towards the shortfall in DWP subsidy contributions for 2025-26 as part of the MTFS.
- The balance is mainly due to the shortfall against CEX 25 – staff savings from Finance senior management (£70,000).

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 2024-25 was £45.536 million and the actual outturn was £30.408 million, resulting in an under spend of £15.128 million.

The most significant variances were:-

COUNCIL WIDE BUDGETS	Net Budget	Actual Outturn	Actual Variance Over/(under) budget	% Variance
	£'000	£'000	£'000	
Capital Financing	6,907	1,351	(5,556)	-80.4%
Council Tax Reduction Scheme	16,054	16,326	272	1.69%
Insurance	1,363	(426)	(1,789)	131.3%
Other Corporate Budgets	10,023	2,254	(7,769)	-77.5%

Capital Financing

- The under spend of £5.556 million mainly relates to a change in the Minimum Revenue Provision Policy approved by Council on 23rd October 2024. The impact in the current year is an under spend on the MRP budget of £2.054 million.
- The balance of the under spend is due to additional interest earned on our investments due to higher interest rates experienced in recent years. Rates started to fall from the high of 5% in November 2024 and have fallen again since, to the current rate of 4.25%. Further interest rate reductions are expected, however the timing of these are uncertain and are subject to economic factors and in particular the position of inflation against the Bank of England's 2% target.

Council Tax Reduction Scheme

- There is an over spend of £272,000 on the Council Tax Reduction Scheme. This is a demand led budget and take-up is difficult to predict. Take-up for 2024-25 is higher than in 2023-24 when the gross spend in this budget area was £15.566 million, which is mainly as a consequence of the 9.5% increase in council tax in 2024-25.
- Council approved a £1 million budget pressure for 2025-26 as part of the MTFS taking the budget up to £17.054 million.

Insurance

- There is an under spend of £1.789 million on the insurance budget. This primarily relates to a £1.517 million reduction in the overall fund liability following a number of claims being repudiated or discontinued, particularly in relation to Japanese Knotweed, as well as those settled at a lower amount or claims won. In addition, as part of the Maesteg School Partnership PFI, the annual Insurance Review has resulted in a one-off exceptional saving of £264,146 which has been refunded to the Council. The outturn for 2024-25 is considered to be a one-off under spend, as it is an adjustment to the fund liability provision required and has not impacted the annual premiums, however the budget will continue to be reviewed going forward to determine if there are any permanent budget reduction opportunities.

Council Wide Budgets

- There is an under spend of £7.769 million on Council wide budgets. The main areas contributing to this under spend are:-
 - During quarter 3 Welsh Government provided a grant of £937,539 towards the teachers' pay award 2024-25 and £2,352,854 toward NJC pay pressures that were not anticipated at budget setting. This has released centrally held funding and positively impacted on the outturn for Council wide budgets by £3.290 million.
 - Inflation rates remained low throughout 2024-25, and remained below the 3.8% rate when the budget was set. In addition, energy prices reduced further than anticipated in 2024-25. Consequently there is an under spend on the price inflation budget due to a reduction in requirements to allocate price inflation to service areas in-year. There is ongoing uncertainty on energy cost increases in 2025-26 and the general trajectory of CPI, therefore it is prudent to maintain a similar level of price inflation funding for 2025-26.
 - As part of the MTFS 2024-28, £1.558 million was set aside towards emerging budget pressures and as a contingency against non-deliverability of budget reduction proposals. Only £87,000 was allocated during 2024-25, resulting in an under spend of £1.543 million. This was agreed as a Council wide budget reduction proposal for 2025-26 as part of the MTFS.

3.3.6 Council Tax Collection

- The outturn for 2024-25 shows additional income of £611,208 has been collected compared to the budget (+ 0.17%). In respect of income collected from the levying of premiums on long term empty properties and second homes, £547,253 was collected from the premium charge for long-term empty properties and £163,080 was collected from premiums on second homes. Without this additional funding the core Council tax collected in 2024-25 fell short of the budgeted income by £99,125.

3.4 Review of Earmarked Reserves

- 3.4.1 The Council is required to maintain adequate financial reserves to meet the needs of the organisation. The MTFS includes the Council's Reserves and Balances Protocol which sets out how the Council will determine and review the level of its Council Fund balance and earmarked reserves. During 2024-25 Directorates drew down funding from specific earmarked reserves and these were reported to Cabinet through the quarterly monitoring reports. The final draw down from revenue reserves was £5.397 million and is summarised in **Table 4** below. A more detailed breakdown of the movement on all reserves is outlined in **Appendix 4**.

Table 4 – Revenue draw down from Earmarked Reserves during 2024-25

	Revenue draw down from Earmarked Reserves 2024-25 £'000
Education, Early Years and Young People	577
Social Services & Wellbeing	1,512
Communities	1,771
Chief Executives	1,537
Total	5,397

3.4.2 The net under spend position of £13.363 million for 2024-25, as set out in **Table 1** and 3.1.6, has enabled new net earmarked reserves of £13.063 million to be created at year end along with a transfer of £300,000 to the Council Fund (see paragraph 3.4.5).

3.4.3 The most significant new earmarked reserves were:- £6.875 million to fund new capital projects (details of schemes to be determined), £1.5 million to support Change Management initiatives to support future invest to save projects, including digital transformation projects, £1 million to provide support for behavioural issues in schools, £150,000 to provide additional capacity to manage planning applications and £150,000 to support youth services.

3.4.4 **Table 5** below summarises the final position on all revenue useable reserves for the year, including the Council Fund. In addition there are currently £46.038 million of other earmarked reserves funding schemes within the capital programme.

Table 5 – Summary of Movement on Revenue Earmarked Reserves 2024-25

Opening Balance 01-Apr-24 £'000	Reserve	Movement at Quarter 4			Closing Balance 31 March 2025 £'000
		Additions £'000	Reclassification £'000	Drawdown/Unwound £'000	
9,730	Council Fund Balance	300	0	0	10,030
10,695	Corporate Reserves	4,241	(568)	(2,382)	11,986
6,668	Directorate Reserves	4,789	942	(4,822)	7,577
4,005	Equalisation & Grant Reserves	687	(914)	(890)	2,888
2,405	School Balances	0	0	(3,024)	(619)
23,773	Total Earmarked Reserve	9,717	(540)	(11,118)	21,832
33,503	Total Useable Reserves	10,017	(540)	(11,118)	31,862

- 3.4.5 In terms of financial reserves, the Council Fund balance has been increased by £300,000 and now represents 2.78% of the net revenue budget for 2024-25, or 4.0% of the net revenue budget excluding schools. As budgets incrementally increase annually, it is challenging to keep the Council Fund balance in line with MTFS Principle 9 which states that:-

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.

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 The Committee is recommended to consider the revenue outturn position for 2024-25.

Background documents: Individual Directorate Monitoring Reports

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PRIOR YEAR BUDGET REDUCTIONS CARRIED FORWARD INTO 2024-25

Ref.	Budget Reduction Proposal		Original Reduction and RAG £000	Revised RAG £000	Total amount of saving achieved in 24-25 £000	Reason why not achieved	Proposed Action in 2025-26 to achieve
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RAG STATUS KEY

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

EDUCATION, EARLY YEARS AND YOUNG PEOPLE

EDFS1 (2023-24)	Delegate some school transport responsibilities to The Bridge Pupil Referral Unit under a new delivery model to deliver efficiency savings		40		40	During 2023-24 officers investigated the practicalities and implications of a bespoke transport arrangement for the Bridge Alternative Provision. It was determined that without capital investment to purchase a vehicle and additional staff resources that the proposal was not possible to be delivered. The transport budget for The Bridge was re-instated to 2022-23 levels. Since September 2023, the approach taken in relation to supporting Post 16 learners with college passes has been changed, with the £40K savings now made on the Post 16 transport budget.	No further action required in 2025-26.
Total Education, Early Years and Young People			40		40		

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	The new site opened during quarter 4 of 2023-24. The timing of the opening meant that exit terms of the lease were being finalised in 2024-25. Once these have been finalised, the full saving will be made.	Once the exit terms have been finalised, the full saving will be made. The service will endeavour to meet any shortfall in the saving through alternative one off efficiencies in 2025-26 to deliver a balanced budget position.
COM 3 (2022-23)	Change the composition of Household Food Waste Bags		35		35	The budget reduction proposal was delayed in 2023-24 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 implemented the change of composition, therefore the saving was made in full during 2024-25.	No action required - saving made in full in 2024-25
COM 4 (2022-23)	Remove Business in Focus from running Enterprise Centres in Bridgend		20		0	Review of Business in Focus operating model explored to identify operating efficiencies with a view to restructuring the management agreement with Business in Focus to deliver this saving.	Review ongoing at the start of 2025-26. Any shortfall in the saving achieved in 2025-26 will be mitigated by savings within the wider Corporate Landlord service area.
COM 5 (2022-23)	Commercially let a wing of Ravens court to a partner organisation or business		50		0	Building was not commercially let during 2024-25.	Sale of the freehold took place in the final quarter of 2024-25 which will enable the savings to be realised in full going into 2025-26.
COM 1 (2023-24)	Closure of each of the Community Recycling Centre sites for one weekday per week		50		50	Public consultation on this proposal was held between 30 June and 12 September 2023, with the outcome reported to Cabinet on 21 November 2023, when the proposal was approved. A marginal saving was made in 2023-24 with the full saving being realised in 2024-25.	No action required - saving made in full in 2024-25
COM 2 (2023-24)	Charging Blue Badge Holders for parking		40		0	The traffic management team were engaged in the introduction of the default national speed limit in built up areas in 2023-24. A staff member commenced work on this proposal in 2024-25 and it is currently at initial consultation stage. It requires a full order making process which is typically 6-9 months.	Shortfalls against this savings target will be met through one off efficiencies in 2025-26 to deliver a balanced budget position.
COM 3 (2023-24)	Commercially let two wings of Ravens court to a partner organisation or business		120		0	Building was not commercially let during 2024-25.	Sale of the freehold took place in the final quarter of 2024-25 which will enable the savings to be realised in full going into 2025-26.
Total Communities Directorate			375		85		
GRAND TOTAL OUTSTANDING REDUCTIONS			415		125		
REDUCTIONS SHORTFALL					290		

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
EDUCATION, EARLY YEARS AND YOUNG PEOPLE (FORMERLY EDUCATION AND FAMILY SUPPORT)						
CENTRAL EDUCATION, EARLY YEARS AND YOUNG PEOPLE						
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.	18	18	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	342	342	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	3	3	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	30	30	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	0	The outcome of the consultation process for the cessation of the ACL service was finalised in quarter 3 of 2024-25. Savings will be achieved in full from 2025-26.	None required - saving will be made in full in 2025-26
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).	35	35	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

Page 44	Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
	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.	38	38	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	17	17	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	81	81	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	16	16	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	22	22	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	35	35	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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.	142	0	Saving not met in 2024-25 due to the overall increase in pupils needing service. There has been a significant increase in the number of pupils receiving both fixed term and permanent exclusions across Bridgend. This has resulted in additional requests for 1:1 support, to maintain their education provision. In addition to this where a pupil has been identified as requiring a specialist class or provision and there is no available space an ancillary package of support is put in place to meet the Additional Learning Needs Provision identified in the pupils Individual Development Plan (IDP) as per the ALN Code for Wales 2021. We currently have waiting lists at every key stage and across provisions.	Consultation is due to start soon with the outcome of the consultation determining the next steps. Shortfalls against this savings target will be met through one off efficiencies in 2025-26 to deliver a balanced budget position.
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	10	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	7	7	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	154	154	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	63	63	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	40	40	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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).	18	18	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	132	132	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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.	26	26	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	14	14	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS30	Edge of Care Services - staffing restructure	This could result in a reduction of services to children and families.	84	84	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	34	34	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Education, Early Years and Young People		1,560	1,269		

SCHOOLS

SCH1	Efficiency savings against School Delegated Budgets - 3% in 2024-2025 then 2% for 2025-26 and 1% thereafter.	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.	3,441	3,441	Savings achieved due to overall reduction in Individual Schools Budget (ISB). However, reduced budgets have resulted in an overall deficit balance for schools at year end of £619,000.	Close monitoring of school budgets will continue going into 2025-26 with a further 1% efficiency saving to be achieved on school delegated budgets and officers continue to work with schools to bring this overall deficit down.
	Total Schools		3,441	3,441		
	Total Education, Early Years and Young People Directorate		5,001	4,710		

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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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.	128	128	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	255	255	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	75	75	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	200	200	The saving has been met in 2024-25 through freezing vacant posts on a temporary basis while the review of Day Services is complete.	None required - saving made in full in 2024-25
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.	250	250	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	45	0	Advice received as to steps required to amend the partnership agreement to support the savings proposal.	On 22 October 2024, Cabinet approved modification of the existing contractual terms to vary the expiry date from 31 March 2027 to 31 March 2032. Work is ongoing to enter into a variation agreement with this budget reduction being the first call on any efficiencies identified.

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	30	30	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	15	15	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	360	65	Cabinet report in May 2024 approved £50K reduction to book fund and removal of £15K subsidy for the Youth Theatre, along with public engagement over how future savings can be achieved. Maximisation of Shared Prosperity Fund mitigated the shortfall against this proposal in 2024-25.	Further reports will be presented to Cabinet to enable the outcome of consultation exercises to be taken into account when finalising any proposed changes. The service will also continue to maximise grant funding opportunities throughout 2025-26.
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%.	8	8	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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 also currently funded from this cost centre so a £20k reduction applicable overall.	15	15	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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	4	Notice served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
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	47	Notice served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
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	20	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	200	200	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	28	Notice served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
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.	250	250	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	55	55	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW26	Increasing Charges for in-house care homes	Aim for full cost recovery on in-house care home charges	140	140	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
SSW27	Reduction of contribution to BAVO SLA by 10%	Financial pressure on BAVO and reduced service provision for citizens of Bridgend	6	6	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Social Services and Wellbeing		2,248	1,891		

COMMUNITIES

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.	34	20	Achieved 58.8% of budget reduction proposal in 2024-25 - a £3,000 increase from the £17,000 achieved up to quarter 3.	Close monitoring of staff mileage budgets will be undertaken throughout 2025-26, with alternative budget reduction proposals to be identified if shortfall continues into the next financial year.
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.	500	500	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	13	13	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	10	10	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	598	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	96	96	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Page 51	Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
	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	97	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	COM9	Cessation of Shopmobility Scheme	Non statutory service and has ceased since October 2022 following the closure of Brackla 1 Car Park.	21	21	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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	5	The service was subject to unforeseen maintenance costs for the harbour gate and infrastructure.	A review of berthing fees will be undertaken with the results to be presented to the Harbour Board in October 2025.
	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	75	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	13	13	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	55	55	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	73	0	Raven's Court was not commercially let during 2024-25. Sharing of accommodation in Civic Offices did not take place until the final quarter of 2024-25.	Sharing of accommodation at Civic Offices along with the sale of the freehold of Raven's Court in the final quarter of 2024-25 will enable the savings to be realised in full going into 2025-26.
	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.	12	12	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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	25	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	300	300	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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 Ogmore 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.	42	42	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	33	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	100	100	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	45	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	35	0	Opportunities were sought to achieve this budget reduction proposal, but let not agreed by end of 2024-25.	Corporate Landlord are currently finalising the terms to lease this unit.
COM29	Removal of Estimator & Cost Control Manager – DLO (Currently Vacant)	Removal of post would require supervisor to undertake duties of cost control.	45	45	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	136	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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.	70	70	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
Total Communities Directorate			2,460	2,311		

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.	18	18	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	510	510	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	150	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	35	35	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX5	Increase Rental income budget at Brynmenyn House - Homelessness hostel	Limited impact as proposal reflects income levels consistently achieved since the Covid-19 pandemic.	63	63	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	71	71	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Page 54	Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
	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.	27	27	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	CEX8	Charging the public for Pest Control Services	Look to implement a full cost recovery model for this service	67	35	Due to reduced uptake of the service, the saving was only partly achieved in 2024-25.	Close monitoring of the income budgets for Pest Control Services will be undertaken throughout 2025-26, with alternative budget reduction proposals to be identified if shortfall continues into the next financial year.
	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.	5	5	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	30	30	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	CEX11	Increase in various Registrars income budgets	Limited impact as proposal reflects income levels consistently achieved since the Covid-19 pandemic.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	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.	43	15	Due to reduced uptake of the service, the saving was only partly achieved in 2024-25	Full saving is anticipated to be met in 2025-26 as early part of year has seen an increase in bookings.
	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 4 posts.	154	94	Saving partly achieved in 2024-25 due to timing of Legal restructure	The restructure of Legal Services has been completed therefore the savings will be made in full from 2025-26.
	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.	160	112	Shortfall in savings target due to timing of implementation of restructure, mitigated partly by under spends on vacant posts.	Phase 2 of Restructure anticipated to be completed in 2025-26 so remainder of saving will be met.
	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.	20	0	Legal Services are reliant on the instructions that come through from Directorates. Due to reduced uptake of the service, the saving was not achieved in 2024-25	This will require close monitoring in 2025-26 and if not achieved alternative budgets will be identified to mitigate any shortfalls.

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
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.	289	228	Shortfall in savings target due to timing of implementation of restructure, mitigated partly by under spends on vacant posts.	The restructure of HR has been completed therefore the savings will be made in full from 2025-26.
CEX17	Household Canvas - Reduction / Limited Canvass Door Knocking	Will focus on poor response areas but will draw criticism from Electoral Commission.	9	0	Saving not achieved due to increased costs associated with canvassing.	This will require close monitoring in 2025-26 and if not achieved alternative budgets will be identified to mitigate any shortfalls.
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.	62	62	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	96	73	Shortfall in savings target due to timing of implementation of restructure	The restructure of Democratic Services has been completed therefore the savings will be made in full from 2025-26.
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)	45	24	Shortfall in savings target due to timing of implementation of restructure	The restructure of Corporate Policy and Public Affairs has been completed therefore the savings will be made in full from 2025-26.
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	397	397	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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	398	59	Further work to be carried out on a review of the telephony budget across the Council following a re-procurement exercise. Update to be provided to Cabinet in future revenue monitoring reports.	Full saving is anticipated to be met in 2025-26 due to re-procurement exercise undertaken on telephony services
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	216	155	Saving partly achieved due to delays in confirmation of alternative external funding towards 2 posts.	Confirmation of funding has now been finalised - Full saving now anticipated to be met in 2025-26.
CEX24	Reduce subsidy to Citizens Advice Bureau by 10%	Financial pressure on CAB and reduced service provision for citizens of Bridgend	22	22	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	70	0	Shortfall in savings target due to timing of implementation of restructure.	Full saving now anticipated to be met in 2025-26 once restructure is complete.
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 e.g. Consortium of Local Authorities in Wales (CLAW).	28	28	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX27	Restructure of the Council's Benefits and Assessment 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, and undertake assessments, and more likelihood of error and fraud.	90	90	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
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.	63	63	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
CEX29	Reduction to the Shared Regulatory Service budget	Reduction in capacity, reduction in service delivery, and impact on staffing levels. Service has been asked to identify savings by three partner Councils and decision will be made by Joint Committee.	58	58	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Chief Executive's Directorate		3,246	2,474		

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.	90	90	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Corporate/Council Wide		90	90		

GRAND TOTAL REDUCTIONS	13,045	11,476
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REDUCTION SHORTFALL		1,569
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6,415	7,071
2,243	1,560
4,387	4,414
13,045	13,045

BRIDGEND COUNTY BOROUGH COUNCIL	Budget 2024-25			Actual Outturn	Actual Variance Over/(under) budget	% Variance
	Expenditure Budget	Income Budget	Net Budget			
	£'000	£'000	£'000	£'000	£'000	
EDUCATION, EARLY YEARS AND YOUNG PEOPLE						
School Delegated Budgets	140,011	(21,302)	118,709	118,709	-	0.0%
Learner Support Group	7,995	(1,004)	6,991	7,263	272	3.9%
Early Years and Young People Group	7,072	(4,133)	2,939	2,411	(528)	-18.0%
Strategic Performance and Support	18,339	(4,428)	13,911	13,063	(848)	-6.1%
Schools Support	1,431	(838)	593	591	(2)	-0.3%
Sustainable Communities For Learning	3,972	-	3,972	3,976	4	0.1%
Other Education and Family Support	1,768	(60)	1,708	2,464	756	44.3%
TOTAL EDUCATION, EARLY YEARS AND YOUNG PEOPLE	180,588	(31,765)	148,823	148,477	(346)	-0.2%
SOCIAL SERVICES AND WELLBEING						
Adult Social Care	97,465	(24,735)	72,730	72,541	(189)	-0.26%
Prevention and Wellbeing	7,586	(1,039)	6,547	6,027	(520)	-7.94%
Childrens Social Care	31,365	(1,179)	30,186	31,384	1,198	3.97%
TOTAL SOCIAL SERVICES AND WELLBEING	136,416	(26,953)	109,463	109,952	489	0.4%
COMMUNITIES DIRECTORATE						
Planning & Development Services	2,327	(1,621)	706	871	165	23.4%
Strategic Regeneration	2,111	(1,149)	962	745	(217)	-22.6%
Economy, Natural Resources and Sustainability	13,742	(12,253)	1,489	1,242	(247)	-16.6%
Cleaner Streets and Waste Management	15,242	(1,773)	13,469	13,723	254	1.9%
Highways and Green Spaces	26,516	(13,512)	13,004	13,882	878	6.8%
Director and Head of Operations - Communities	286	-	286	297	11	3.8%
Corporate Landlord	15,862	(12,507)	3,355	2,830	(525)	-15.6%
TOTAL COMMUNITIES	76,086	(42,815)	33,271	33,590	319	1.0%
CHIEF EXECUTIVE'S						
Chief Executive Unit	494	-	494	526	32	6.5%
Finance	39,360	(35,284)	4,076	4,300	224	5.5%
HR/OD	2,345	(398)	1,947	2,008	61	3.1%
Partnerships	3,578	(1,303)	2,275	2,502	227	10.0%
Legal, Democratic & Regulatory	6,920	(1,069)	5,851	6,194	343	5.9%
Elections	181	-	181	189	8	4.4%
ICT	5,333	(1,259)	4,074	4,786	712	17.5%
Housing & Homelessness	11,473	(7,921)	3,552	3,826	274	7.7%
Business Support	1,244	(116)	1,128	1,161	33	2.9%
TOTAL CHIEF EXECUTIVE'S	70,928	(47,350)	23,578	25,492	1,914	8.1%
TOTAL DIRECTORATE BUDGETS	464,018	(148,883)	315,135	317,511	2,376	0.8%
Council Wide Budgets	46,911	(1,375)	45,536	30,408	(15,128)	-33.2%
Net Council Tax Collection				(611)	(611)	0.0%
Appropriations to Earmarked Reserves				13,063	13,063	0.0%
Transfer to Council Fund				300	300	0.0%
NET BRIDGEND CBC	510,929	(150,258)	360,671	360,671	-	0.0%

NB: Differences due to rounding of £000's

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APPENDIX 4

**TOTAL MOVEMENT ON REVENUE AND CAPITAL EARMARKED RESERVES AS AT 31ST MARCH
2025**

Opening Balance 01 Apr 24 £'000	Reserve	Movement as at 31 March 2025		Closing Balance 31 Mar 25 £'000
		Net Additions/ Reclassification £'000	Draw-down/ unwound £'000	
	Corporate Reserves:			
430	Asset Management Plan	-	(127)	303
1,856	Building Maintenance Reserve	-	(650)	1,206
123	Capital Asset Management & Asbestos Fund	-	(123)	-
349	Capital Feasibility Fund	611	(180)	780
349	Change Management	1,500	(22)	1,827
1,446	Digital Transformation, ICT & Finance Systems	(438)	(541)	467
500	Economic and Future Resilience Fund	-	-	500
830	Insurance Reserve	-	-	830
500	Major Claims Reserve	1,000	(500)	1,000
2,406	MTFS Budget Contingency	1,000	(226)	3,180
13	Property Disposal Strategy	-	(13)	-
1,893	Service Reconfiguration	-	-	1,893
10,695	Total Corporate Reserves	3,673	(2,382)	11,986
	Directorate Reserves:			
6,356	Directorate Issues	5,731	(4,533)	7,554
186	Looked After Children	-	(186)	-
103	Porthcawl Regeneration	-	(103)	-
23	Wellbeing Projects	-	-	23
6,668	Total Directorate Reserves	5,731	(4,822)	7,577
	Equalisation & Grant Reserves:			
63	Civil Parking Enforcement	142	(8)	197
914	HWB Schools Infrastructure	(914)	-	-
2,095	IFRS Grants	412	(734)	1,773
137	Local Development Plan	37	-	174
752	Special Regeneration Fund	76	(147)	681
44	Rest Bay	19	-	63
4,005	Equalisation & Grant Reserves:	(228)	(889)	2,888
2,405	School Balances	-	(3,024)	(619)
40,223	Capital Programme Contribution	8,507	(2,692)	46,038
9,730	Council Fund Balance	300	-	10,030
73,726	TOTAL RESERVES	17,983	(13,809)	77,900

NB: Differences due to rounding of £000's

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Meeting of:	CORPORATE OVERVIEW AND SCRUTINY COMMITTEE
Date of Meeting:	30 JUNE 2025
Report Title:	SCRUTINY BUDGET WORKING GROUP
Report Owner / Corporate Director:	CHIEF OFFICER, LEGAL AND REGULATORY SERVICES, HR AND CORPORATE POLICY
Responsible Officer:	RACHEL KEEPINS DEMOCRATIC SERVICES MANAGER
Policy Framework and Procedure Rules:	The Committee considered a Review of Scrutiny on 17 March 2025 and, subsequent to this, on 9 April 2025, Council agreed changes to the structure, names and remit of Scrutiny Committees and the setting up of a Budget Working Group. Accordingly, as required by the Council's Constitution, Council approved the related amendments to the Overview and Scrutiny Procedure rules within the Constitution and the size and Terms of Reference for the Overview and Scrutiny Committees at its Annual Meeting held on 14 May 2025.
Executive Summary:	The Committee considered a report on the Scrutiny Review and the options for scrutiny arrangements going forward on 17 March 2025. Subsequently, on 9 April 2025, Council agreed changes to the structure, names and remit of Scrutiny Committees and the setting up of a Budget Working Group. This report presents the Committee with details of the work being undertaken in consultation with Scrutiny Chairs on the proposed arrangements for the Budget Working Group, for the Committee's consideration.

1. Purpose of Report

1.1 To present the Committee with the proposed arrangements for the Budget Working Group for consideration, including:

- a. Size, composition and nominations process for the Working Group;
- b. Draft Terms of Reference;
- c. Proposed Structure of Scrutiny Budget Working Group and Draft outline of schedule of meetings.

2. Background

- 2.1 At its meeting held on 17 March 2025 the Committee considered a report on the Scrutiny Review and the options for scrutiny arrangements going forward and made the following recommendation and request:

“Of the options presented within the report, the Committee unanimously favoured and **recommended** option 2; to retain 4 Scrutiny Committees with the Corporate Overview and Scrutiny Committee and three formally themed Committees: ‘Education, Social Services and Communities’ or similar. This was on the condition that the caveats contained in the report were included in that the names and remits of the Committees would not preclude a Committee from scrutinising an item in its entirety should any aspect stray slightly into the remit of another.

- 2.2 Members may recall that previous scrutiny of the Budget process included a dedicated Budget Research and Evaluation Panel (BREP), plus detailed scrutiny of the draft budget by each individual Overview and Scrutiny Committee (OVSC) who feed back to the Corporate Overview and Scrutiny Committee (COSC) to provide recommendations to Cabinet. This process resulted in an intense period of scrutiny in early January, which was resource intensive for officers and Members and there has been cross party feedback that the sessions are repetitive and overlap in subject matters.
- 2.3 On 9 April 2025, as part of its consideration of the Scrutiny Review, Council took the decision to allocate budget scrutiny exclusively to COSC and agreed that a working group be established with representatives from all scrutiny committees and chaired by the Chair of COSC to feed back to COSC. This would reduce duplication and allow for in-depth scrutiny to be undertaken throughout the budget setting process with meaningful engagement between Cabinet and Scrutiny.
- 2.5 In light of these decisions taken, work has been ongoing in consultation with Scrutiny Chairs regarding proposed arrangements for the Budget Working Group.

3. Current situation / proposal

- 3.1 Meetings have been held with the four Scrutiny Chairs to discuss arrangements for the setting up of the Working Group, its composition, frequency of meetings, role and purpose.

The following arrangements are therefore proposed with a plan to embed the process for 2025-26, with the potential to review and update in the future, evaluating its benefits, impact and outcomes and any improvements that could be made.

Size, Composition and Nominations to the Working Group

- 3.2 On 9 April 2025 Council agreed that the working group be established with representatives from all scrutiny committees and chaired by the Chair of COSC, to feed back to COSC. It is proposed that all Scrutiny Chairs sit on the Working Group.
- 3.3 It is proposed that the Scrutiny Budget Working Group be comprised of a total of 24 Members from across all Overview and Scrutiny Committees (OVSC), with Group Leaders being asked to seek expressions of interest for nominations from their Members. The Scrutiny Chairs agreed that whilst there would be an aim for political balance as far as possible, it was important that membership focused on Members who express a real interest in sitting on the Group and could commit their time, rather than meeting an allocated number. A membership of 24 was felt appropriate as it would allow for wide participation from Members with knowledge and experience from across all four Overview and Scrutiny Committee remits.

Draft Terms of Reference

- 3.4 Draft Terms of reference for the Scrutiny Budget Working Group (SBWG) are attached as **Appendix A** for Members' consideration.

Proposed Structure of Scrutiny Budget Working Group

- 3.5 A proposed structure for the Scrutiny Budget Working Group is attached as **Appendix B** which maps out the suggested meetings for this year to feed into the draft MTFS Budget process for 2026-30 Budget. The structure incorporates the following proposals from the Scrutiny Chairs:
- a. **Budget Steering Group meeting in July**
Comprising: Chief Executive, Chief Officer - Finance, Housing and Change, Leader, Cabinet Member for Finance and Performance, Cabinet Members for Resources, Scrutiny Chairs and Group Leaders. Steering Group to consider and discuss previous year's recommendations and 2025-26 indicative proposals, main priorities going forward and areas of concern. This to then inform where Scrutiny can add value, proposing potential areas of focus for the Scrutiny Budget Working Group and Deep Dive Groups to consider.
 - b. **Scrutiny Budget Working Group in early September**
To discuss areas of focus following outcome from the Steering Group and allocate up to 6 SBWG Members to each of the four proposed Deep Dive Groups. Membership of Deep Dive Groups should be based on Member knowledge, expertise or preference expressed to contribute to a specific Deep Dive Group. Chief Officer - Finance, Housing and Change to be invited to answer any overarching questions.

- c. **Four Deep Dive Groups meet once each from mid September to mid October and present findings to Scrutiny Budget Working Group mid-end October**

These Deep Dive Groups would be chaired by the corresponding Chair of the related OVSC and include up to 5 other Members.

Scrutiny will support the meetings and draft outline actions arising, however it will be for the Chair of each Deep Dive Group to present the key findings to all Members of SBWG, to discuss their merits and agree any resulting Recommendations.

This will enable there to be one clear overarching set of recommendations from the SBWG rather than four sets of recommendations that may potentially overlap, conflict or risk too much duplication.

The Chair of Corporate Overview and Scrutiny Committee would observe all Deep Dive Groups discussions and conclusions as well as chairing the relevant one to their OVSC.

- d. **Budget Steering Group Meeting in early November**
To present the Conclusions and Recommendations of the Scrutiny Budget Working Group to feed into and potentially impact the development of Cabinet's draft budget proposals and Medium Term Financial Strategy (MTFS).
- e. **COSC 11 December 2025**
To receive the conclusions from the Scrutiny Budget Working group for endorsing and formal onward reporting to Cabinet (as COSC is the Scrutiny Committee with overall responsibility for budget scrutiny).
- f. **Cabinet 16 December 2025**
To formally receive the conclusions and Recommendations of the Budget Working Group from COSC in advance of final budget proposals and formal response to be provided by Cabinet on 17 Feb 2026.
- g. **COSC 15 and 27 January 2026**
COSC consider draft MTFS and budget proposals and make Conclusions and Recommendations to Cabinet.
- h. **Cabinet 3 February 2026**
To present COSC Conclusions and Recommendations on the draft MTFS and Budget proposals
- i. **Cabinet 17 February 2026**
Cabinet considers recommendations and agrees final MTFS / budget.
- j. **Council 25 February 2026**
Council considers budget and votes on it.

- 3.6 Members are asked to note that as well as the ongoing budget work of the COSC and SBWG, the Chief Officer – Finance, Housing and Change has agreed to provide regular budget briefing sessions to all Members and to individual Political Groups should they wish.

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 as a result of this report.

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

- 5.1 The well-being goals identified in the Act were considered in the preparation of this report. It is considered that there will be no significant or unacceptable impacts upon the achievement of well-being goals/objectives as a result of this report.
- 5.2 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 scrutiny function contributes to the 5 Ways of Working set out in the Well-being of Future Generations (Wales) Act 2015 and how they contribute to the Council developing its own five ways of working, driving and measuring those ways of working.
- 5.3 The scrutiny arrangements assists in the achievement of the Council's 4 Well-being Objectives under the Well-being of Future Generations (Wales) Act 2015, listed below:
1. A prosperous place with thriving communities
 2. Creating modern, seamless public services
 3. Enabling people to meet their potential
 4. Supporting our most vulnerable

6. Climate Change and Nature Implications

- 6.1 There are no Climate Change or Nature Implications arising from this report.

7. Safeguarding and Corporate Parent Implications

- 7.1 There are no Safeguarding and Corporate Parent Implications arising from this report.

8. Financial Implications

8.1 There are no financial implications arising from this report.

9. Recommendation

9.1 The Committee is requested to consider the report on the work undertaken in consultation with Scrutiny Chairs on the proposed arrangements for the Scrutiny Budget Working Group for and agree the:

- a. Size, composition and nominations process for the Working Group;
- b. Draft Terms of Reference;
- c. Proposed Structure of Scrutiny Budget Working Group and Draft outline of schedule of meetings.

Background documents

None.

Scrutiny Budget Working Group
Draft Terms of Reference

Aims:

- a. Achieve consensus on the direction of the budget over the life of the medium-term financial strategy.
- b. Assist the Council to develop a budget for the forthcoming year that aims to meet the needs of the communities of Bridgend County Borough;
- c. Facilitate firmer understanding of the budget setting process and to assist COSC in making informed comments, constructive challenge and recommendations to Cabinet as part of the budget consultation process.

Terms of Reference:

1. Identify and explore potential budget areas for budget reductions / investment and agree Recommendations to Cabinet for consideration and development prior to finalisation of the Council's draft MTFS and budget proposals,
 2. Areas of focus should consider the impact of proposals on:
 - a. Council's corporate plan and wellbeing objectives
 - b. The needs of individuals and communities
 - c. Service performance and outcomes
 - d. Affordability, achievability, sustainability, and value for money
 3. Work with Cabinet Members and Corporate Directors to understand the need for change in the context of the Council's emerging corporate priorities and MTFS;
 4. To treat any budget information received as part of the budget planning process as confidential until such time that it is formally placed in the public domain.
 5. To focus on non-political, Council wide issues and priorities;
 6. To have innovation at the centre of its work to identify effective proposals and solutions and take a consistent challenging approach to achieve the aims as set out above;
 7. To ensure that the SBWG process assists and is central to the scrutiny of the MTFS and adds value, avoiding duplication with the Scrutiny Committee budget process.
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STEP 1 - Scrutiny to seek nominations of up to 24 Members (politically balanced as far as possible) to sit on the Scrutiny Budget Working Group – Early July 2025

STEP 2 - STEERING GROUP MEET – JULY 2025

Comprising: Group Leaders, Scrutiny Chairs, Cabinet Member for Finance and Performance, Cabinet Member(s) for Resources and Chief Executive and Chief Officer- Finance, Housing and Change

Role: To propose areas of focus for Scrutiny Budget Working Group and Deep Dive Groups to consider the previous year’s recommendations and 2025-26 MTFS indicative proposals, the main priorities going forward, areas of concern and areas of focus where can Scrutiny add value

STEP 3 - SCRUTINY BUDGET WORKING GROUP MEET – EARLY SEPTEMBER 2025

Comprising: Total up to 24 Members and Chaired by Chair of Corporate Overview and Scrutiny Committee

Invitees: Chief Executive, Chief Officer- Finance, Housing and Change, Head of Finance, Cabinet Member Finance and Performance

Role/Purpose: Discuss areas of focus following outcome from Steering Group and allocate up to 6 SBWG Members to each of the Deep Dive Groups based on their knowledge, expertise or preference expressed to contribute to a specific deep dive.
(Members will need to ensure they are able to commit to attending the Deep Dive Groups on the identified dates)

STEP 4– DEEP DIVE GROUPS MEET ONCE EACH FROM MID SEPTEMBER TO MID OCTOBER 2025

Chief Executive <u>Chaired by Chair of Corporate Overview and Scrutiny Committee</u>	Education and Youth Services <u>Chaired by Chair of Education and Youth Service Overview and Scrutiny Committee</u>	Social Services and Wellbeing <u>Chaired by Chair of Social Services, Health and Wellbeing Overview and Scrutiny Committee</u>	Communities <u>Chaired by Chair of Communities, Environment and Housing Overview and Scrutiny Committee</u>
<u>Comprising:</u> up to 6 SBWG Members to be agreed by SWBG. Leader, Cabinet Member for Finance and Performance, Cabinet Member(s) for Resources, Chief Executive, Chief Officer- Finance, Housing and Change, Chief Officer, Legal and Regulatory Services, HR and Corporate Policy, Head of Finance, Finance Manager - Chief Executive’s Directorate and any other relevant Officers <u>Role:</u> To undertake a deep dive into areas of focus in the Chief Executive’s Directorate as directed by the SBWG.	<u>Comprising:</u> 6 SBWG Members to be agreed by SBWG, Cabinet Member for Finance and Performance, Cabinet Member(s) for Resources, Cabinet Member for Education and Youth Services, Corporate Director for Education, Early Years and Young People, Chief Officer- Finance, Housing and Change, Head of Finance, Finance Manager - Communities, Education and Family Support, and any other relevant Officers <u>Role:</u> To undertake a deep dive into areas of focus in the Education and Youth Services Directorate as directed by the SBWG.	<u>Comprising:</u> 6 SBWG Members to be agreed by SBWG, Cabinet Member for Finance and Performance, Cabinet Member(s) for Resources, Cabinet Member for Social Services, Health and Wellbeing, Corporate Director for Social Services and Wellbeing, Chief Officer- Finance, Housing and Change, Head of Finance, Finance Manager – Social Services and Wellbeing, and any other relevant Officers <u>Role:</u> To undertake a deep dive into areas of focus in the Social Services and Wellbeing Directorate as directed by the SBWG	<u>Comprising:</u> 6 SBWG Members to be agreed by SBWG, Cabinet Member for Finance and Performance, Cabinet Member(s) for Resources, Cabinet Member for Climate Change and the Environment, Cabinet Member for Regeneration, Economic Development and Housing, Corporate Director for Communities, Chief Officer- Finance, Housing and Change, Head of Finance, Finance Manager – Communities, Education and Family Support and any other relevant Officers <u>Role:</u> To undertake a deep dive into areas of focus in the Communities Directorate as directed by the SBWG

Scrutiny will support the meetings and draft outline actions arising, however it will be for the Chair of each Deep Dive Group to present the key findings from their Group and Members of each Group to discuss their merits at the SBWG for the agreement of any resulting overall Recommendations

STEP 5 - SCRUTINY BUDGET WORKING GROUP – MID TO END OCTOBER 2025

Comprising: up to 6 Members from each of the Deep Dive Groups – total up to 24 Members and Chaired by Chair of COSC
Role/Purpose: Chairs of the Deep Dive Groups present the Key Findings from their Group. SBWG to discuss findings and reach an agreement on overall conclusions and recommendations from the Working Group.

STEP 6 – STEERING GROUP – NOVEMBER 2025

Comprising: Group Leaders, Scrutiny Chairs, Cabinet Member for Finance and Performance, Cabinet Member(s) for Resources and Chief Executive and Chief Officer- Finance, Housing and Change
Purpose: To present the Recommendations from the Scrutiny Budget Working Group to feed into the development of the draft budget proposals and MTFS.

STEP 7 – CORPORATE OVERVIEW AND SCRUTINY COMMITTEE – 11 DECEMBER 2025

Purpose: To receive the Conclusions and Recommendations from the Working Group for endorsing and official onward reporting to Cabinet (as Scrutiny Committee with overall responsibility for budget scrutiny)

STEP 8 - CABINET – 16 DECEMBER 2025

Purpose: To formally receive the Conclusions and Recommendations from COSC to be considered by Cabinet/CMB in advance of final budget proposals published after the RSG is finalised and formal response to be provided by Cabinet on 17 Feb 2026

STEP 9 - CORPORATE OVERVIEW AND SCRUTINY COMMITTEE – 15 and 27 January 2026

COSC consider draft MTFS and budget proposals in the public domain and make any conclusions/recommendations.

STEP 10 - CABINET – 3 FEBRUARY 2026

To formally present the Conclusions and Recommendations from COSC on the draft MTFS and Budget proposals to Cabinet.

STEP 11 - CABINET – 17 FEBRUARY 2026

Cabinet considers final recommendations and agree final budget/MTFS and provides formal response to Recommendations.

STEP 12 - COUNCIL - 25 FEBRUARY 2026

Council considers budget and votes on it.

Meeting of:	CORPORATE OVERVIEW AND SCRUTINY COMMITTEE
Date of Meeting:	30 JUNE 2025
Report Title:	CORPORATE PARENTING CHAMPION NOMINATION
Report Owner / Corporate Director:	CHIEF OFFICER – LEGAL & REGULATORY SERVICES, HR & CORPORATE POLICY
Responsible Officer:	MERYL LAWRENCE SENIOR DEMOCRATIC SERVICES OFFICER – SCRUTINY
Policy Framework and Procedure Rules:	The work of the Overview and Scrutiny Committees relates to the review and monitoring of plans, policy or strategy that form part of the Council's Policy Framework and consideration of plans, policy or strategy relating to the power to promote or improve economic, social or environmental wellbeing in the County Borough of Bridgend. Any changes to the structure of the Scrutiny Committees and the procedures relating to them would require the Bridgend County Borough Council Constitution to be updated.
Executive Summary:	Corporate Parenting is the term used to describe the responsibility of a local authority towards care experienced children and young people. This is a legal responsibility given to local authorities by the Children Act 1989 and the Children Act 2004. The role of the Corporate Parent is to seek for children in public care the outcomes every good parent would want for their own children. The Council as a whole is the 'Corporate Parent' therefore all Members have a level of responsibility for care experienced children and young people in Bridgend. In order to further develop and enhance the Council's Corporate Parenting role with its partners, a Cabinet Committee Corporate Parenting comprising all Members of Cabinet was established by Cabinet on 4 November 2008. The Committee is being asked to nominate one Member as its Corporate Parenting Champion to represent the Committee as an invitee at meetings of the Cabinet Committee Corporate Parenting.

1. Purpose of Report

- 1.1 The purpose of this report is to request the Committee to nominate one Member as its Corporate Parenting Champion to represent the Committee as an invitee at meetings of the Cabinet Committee Corporate Parenting.

2. Background

- 2.1 Corporate Parenting is the term used to describe the responsibility of a local authority towards care experienced children and young people. This is a legal responsibility given to local authorities by the Children Act 1989 and the Children Act 2004. The role of the Corporate Parent is to seek for children in public care the outcomes every good parent would want for their own children. The Council as a whole is the 'Corporate Parent' therefore all Members have a level of responsibility for care experienced children and young people in Bridgend.
- 2.2 In order to further develop and enhance the Council's Corporate Parenting role with its partners, a Cabinet Committee Corporate Parenting comprising all Members of Cabinet was established by Cabinet on 4 November 2008.
- 2.3 The inaugural meeting of the Cabinet Committee was held on 27 November 2008 where it was agreed that the Cabinet Committee will meet quarterly. The terms of reference for the Cabinet Committee Corporate Parenting are:
- to ensure that care experienced children and young people are seen as a priority by the whole of the Authority and by the Children and Young People's Partnership;
 - to seek the views of children and young people in shaping and influencing the parenting they receive;
 - to ensure that appropriate policies, opportunities and procedures are in place;
 - to monitor and evaluate the effectiveness of the Authority in its role as Corporate Parent against Welsh Government guidance.
- 2.4 At its inaugural meeting, the Cabinet Committee requested that a Corporate Parenting "Champion" be nominated from each of the Overview and Scrutiny Committees to become invitees to the Cabinet Committee.

3. Current situation / proposal

- 3.1 The Committee is requested to nominate one Member as its Corporate Parenting Champion to represent the Committee as an invitee at meetings of the Cabinet Committee Corporate Parenting.
- 3.2 The role of the Corporate Parenting Champion is to represent their Overview and Scrutiny Committee, partaking in discussions with Cabinet over items relating to care experienced children and young people.
- 3.3 It is also suggested that in this role each Champion considers how all services within the remit of Scrutiny affect care experienced children and young people and encourage their own Committee to bear their Corporate Parenting role in mind when participating in Scrutiny.

- 3.4 Scrutiny Champions can greatly support the Committee by advising them of the ongoing work of the Cabinet Committee and particularly any decisions or changes which they should be aware of as Corporate Parents.

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 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 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:

- Long Term – The establishment of the Corporate Parenting Cabinet Committee demonstrates the Authority's long-term commitment to improving and strengthening their role as Corporate Parents to care experienced children and young people.
- Prevention – The Corporate Parenting Cabinet Committee are preventative in their nature and ensure that appropriate policies, opportunities and procedures are in place for all care experienced children and young people.
- Integration – This report supports all the Well-being Objectives.
- Collaboration – All Members are Corporate Parents and this report supports collaborative working with Cabinet and Members of Scrutiny and emphasises the role of Corporate Parents for all Elected Members.
- Involvement – Corporate Parent Champions provide practical support and guidance to care experienced children and young people to ensure they achieve their well-being goals.

- 5.2 Nomination of a Corporate Parenting Champion assists in the achievement of the following of the Council's 4 Wellbeing Objectives under the **Well-being of Future Generations (Wales) Act 2015**:-

3. Enabling people to meet their potential

Provide an effective Childcare and Early Years Offer, provide safe, supportive schools with high quality teaching, provide Welsh medium education opportunities, be good parents to our care experienced children and help people get the skills they need for work.

4.Supporting our most vulnerable

Providing high-quality children's and adults social services and early help services, supporting people in poverty, supporting people facing homelessness to find a place to live, supporting children with additional learning needs and safeguard and protect people who are at risk of harm.

6. Climate Change and Nature Implications

6.1 There are no Climate Change or Nature Implications arising from this report.

7. Safeguarding and Corporate Parent Implications

7.1 The Cabinet Committee Corporate Parenting addresses any impact on children or young people within the care of the Authority, under the Council's responsibility as a Corporate Parent. Safeguarding is everyone's business and means protecting peoples' health, wellbeing and human rights, and enabling them to live free from harm, abuse and neglect.

8. Financial Implications

8.1 There are no financial implications arising from this report.

9. Recommendation

9.1 The Committee is asked to nominate one Member of the Committee as its Corporate Parenting Champion to represent the Committee as an invitee at meetings of the Cabinet Committee Corporate Parenting.

Background documents

None.

Meeting of:	CORPORATE OVERVIEW AND SCRUTINY COMMITTEE
Date of Meeting:	30 JUNE 2025
Report Title:	CWM TAF MORGANNWG PUBLIC SERVICES BOARD (PSB) JOINT OVERVIEW AND SCRUTINY COMMITTEE (JOSC) NOMINATIONS
Report Owner / Corporate Director:	CHIEF OFFICER – LEGAL & REGULATORY SERVICES, HR & CORPORATE POLICY
Responsible Officer:	MERYL LAWRENCE SENIOR DEMOCRATIC SERVICES OFFICER - SCRUTINY
Policy Framework and Procedure Rules:	The work of Overview and Scrutiny Committees relate to the review and monitoring of plans, policy or strategy that form part of the Policy Framework and consideration of plans, policy or strategy relating to the power to promote or improve economic, social or environmental wellbeing in the County Borough of Bridgend. Any changes to the structure of the Scrutiny Committees and the procedures relating to them would require the Bridgend County Borough Council Constitution to be updated.
Executive Summary:	Joint scrutiny arrangements and Terms of Reference for Cwm Taf Morgannwg Public Services Board Joint Overview and Scrutiny Committee (JOSC) were agreed by Council on 19 July 2023, to ensure effective scrutiny arrangements are in place to scrutinise the newly established single Public Services Board (PSB) for Cwm Taf Morgannwg. The Corporate Overview and Scrutiny Committee (COSC) as the Scrutiny Committee designated to scrutinise the work of the Public Service Board as required by the Well-being of Future Generations (Wales) Act, 2015 and based on the political balance of this Committee as far as practical, nominates 5 Members to the Cwm Taf Morgannwg PSB JOSC and one substitute Member from the Committee to attend the JOSC when one of the core Members are not available.

	This report seeks nominations to the Cwm Taf Morgannwg PSB JOSC for the 2025-26 municipal year, for 5 Members of COSC and 1 Substitute member to attend when one of the core Members are not available, based on the political balance of the Committee, as follows: - 3 Members from Labour; - 1 Member and 1 Substitute Member from Bridgend County Independents; - 1 Member from Democratic Alliance.
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1. Purpose of Report

- 1.1 The purpose of the report is to request the Committee to nominate for the 2025-26 municipal year, 5 Members to the Cwm Taf Morgannwg Public Service Board Joint Overview and Scrutiny Committee and 1 Substitute Member to attend when one of the core Members are not available, based on the political balance of the Committee, as follows:
- 3 Members from Labour;
 - 1 Member and 1 Substitute Member from Bridgend County Independents;
 - 1 Member from Democratic Alliance.

2. Background

- 2.1 Joint scrutiny arrangements and Terms of Reference for the Cwm Taf Morgannwg Public Services Board Joint Overview and Scrutiny Committee were agreed by Council on 19 July 2023, to ensure effective scrutiny arrangements are in place to scrutinise the established single Public Service Board (PSB) for Cwm Taf Morgannwg.
- 2.2 Since the 2023-24 municipal year, COSC (as the Scrutiny Committee designated to scrutinise the work of the Public Service Board as required by the Well-being of Future Generations (Wales) Act, 2015 and based on the political balance of this Committee as far as practical), have nominated five members of the Committee to the Cwm Taf Morgannwg Public Service Board Joint Overview and Scrutiny Committee (PSB JOSC) and one substitute Member from COSC to attend the JOSC when one of the core Members are not available.

3. Current situation / proposal

3.1 Consequently, for the 2025-26 municipal year nominations are requested to the Cwm Taf Morgannwg PSB JOSC of 5 Members and 1 Substitute Member from this Committee to attend when one of the core Members are not available, based on the political balance of the Committee as far as practical, as follows:

- 3 Members from Labour;
- 1 Member and 1 Substitute Member from Bridgend County Independents;
- 1 Member from Democratic Alliance.

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 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 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:

- Long Term – The establishment of the Joint Scrutiny Arrangements will enable the Authority's long-term commitment to effective scrutiny of the Cwm Taf Morgannwg PSB.
- Prevention – The PSB Wellbeing Assessment and Plan will be preventative in nature and progress will be scrutinised effectively.
- Integration – The proposed arrangements are for integrated joint scrutiny by three Local Authorities of the integrated partnership arrangements of the Cwm Taf Morgannwg Public Service Board.
- Collaboration – This report supports collaborative working with other Local Authorities and partners to effectively scrutinise the PSB.

- Involvement – The joint arrangements will enable effective scrutiny of the wellbeing assessment, plan and progress and promote the involvement of stakeholders, partners in scrutiny activity.

5.2 The proposed arrangements will assist in the achievement of the Council's 4 Well-being Objectives under the **Well-being of Future Generations (Wales) Act 2015**, listed below:

1. A prosperous place with thriving communities
2. Creating modern, seamless public services
3. Enabling people to meet their potential
4. Supporting our most vulnerable

6. Climate Change and Nature Implications

6.1 There are no Climate Change or Nature Implications arising from this report.

7. Safeguarding and Corporate Parent Implications

7.1 There are no Safeguarding and Corporate Parent Implications arising from this report.

8. Financial Implications

8.1 There are no financial implications arising from this report.

9. Recommendation

9.1 For the 2025-26 municipal year, the Committee is requested to nominate 5 Members to the Cwm Taf Morgannwg PSB JOSC and 1 Substitute Member to attend when one of the core Members are not available, based on the political balance of this Committee, as follows:

- 3 Members from Labour;
- 1 Member and 1 Substitute Member from Bridgend County Independents;
- 1 Member from Democratic Alliance.

Background documents

None.

Meeting of:	CORPORATE OVERVIEW AND SCRUTINY COMMITTEE
Date of Meeting:	30 JUNE 2025
Report Title:	FORWARD WORK PROGRAMME UPDATE
Report Owner / Corporate Director:	CHIEF OFFICER – LEGAL & REGULATORY SERVICES, HR & CORPORATE POLICY
Responsible Officer:	MERYL LAWRENCE SENIOR DEMOCRATIC SERVICES OFFICER – SCRUTINY
Policy Framework and Procedure Rules:	The work of the Overview & Scrutiny Committees relates to the review and development of plans, policy or strategy that form part of the Council's Policy Framework and consideration of plans, policy or strategy relating to the power to promote or improve economic, social or environmental wellbeing in the County Borough of Bridgend.
Executive Summary:	The Council's Constitution requires the Corporate Overview and Scrutiny Committee to develop and implement a Forward Work Programme for the Committee. The Committee is asked to consider and agree its Forward Work Programme, identify any specific information it wishes to be included in and any invitees they wish to attend for the reports for the next two Committee meetings, identify any further items for consideration on the Forward Work Programme having regard to the criteria set out in the report and note the Recommendations Monitoring Action Sheet for this Committee.

1. Purpose of Report

1.1 The purpose of this report is to:

- a) Present the Committee with the Forward Work Programme attached as **Appendix A** for consideration and approval;
- b) Request any specific information the Committee identifies to be included in the items for the next two meetings, including invitees they wish to attend;

- c) Request the Committee to identify whether there are presently any further items for consideration on the Forward Work Programme having regard to the selection criteria in paragraph 3.5 of this report;
- d) Present the Recommendations Monitoring Action Sheet for this Committee attached as **Appendix B** to track responses to the Committee's recommendations made at previous meetings;
- e) Advise that the proposed draft Forward Work Programmes for the other Overview and Scrutiny Committees will be reported to the next meeting of Corporate Overview Scrutiny Committee (COSC) for information, following consideration in their July Committee meetings.

2. Background

- 2.1 The Council's Constitution requires the Corporate Overview and Scrutiny Committee to develop and implement a Forward Work Programme for the Committee.
- 2.2 The Council's Constitution also provides for each of the other Overview and Scrutiny Committees to propose items for the Forward Work Programme having regard for the Council's Corporate Priorities and Risk Management framework. Where a matter for consideration by an Overview and Scrutiny Committee also falls within the remit of one or more other Committees, the decision as to which Committee will consider it will be resolved by the respective Chairs or, if they fail to agree, the Chair of the Corporate Overview and Scrutiny Committee.

Best Practice / Guidance

- 2.3 The Centre for Governance and Scrutiny's (CfGS) Good Scrutiny Guide recognises the importance of the forward work programme. In order to 'lead and own the process', it states that Councillors should have ownership of their Committee's work programme, and be involved in developing, monitoring and evaluating it. The Good Scrutiny Guide also states that, in order to make an impact, the scrutiny workload should be coordinated and integrated into corporate processes, to ensure that it contributes to the delivery of corporate objectives, and that work can be undertaken in a timely and well-planned manner.
- 2.4 Forward Work Programmes need to be manageable to maximise the effective use of the limited time and resources of Scrutiny Committees. It is not possible to include every topic proposed. Successful Scrutiny is about looking at the right topic in the right way and Members need to be selective, while also being able to demonstrate clear arguments for including or excluding topics.
- 2.5 The CfGS's guide to effective work programming 'A Cunning Plan?' makes the following reference to the importance of good work programming:

'Effective work programming is the bedrock of an effective scrutiny function. Done well it can help lay the foundations for targeted, incisive and timely work on issues of local importance, where scrutiny can add value. Done badly, scrutiny can end up wasting time and resources on issues where the impact of any work done is likely to be minimal.'

3. Current situation / proposal

Corporate Overview and Scrutiny Committee Draft Forward Work Programme

- 3.1 Following the approval of the schedule of Scrutiny Committee meeting dates at the Annual Meeting of Council on 14 May 2025, the standing statutory reports to this Scrutiny Committee of: the Corporate Plan, the Medium Term Financial Strategy (MTFS) and Budget, Performance and Budget Monitoring, etc. have been mapped to the appropriate timely meeting dates into a draft Forward Work Programme.
- 3.2 The draft outline Forward Work Programme for each of the other Overview and Scrutiny Committees have been prepared using a number of difference sources, including:
- Corporate Risk Assessment;
 - Directorate Business Plans;
 - Previous Scrutiny Committee Forward Work Programme report topics / Minutes;
 - Committee / Member proposed topics;
 - Policy Framework;
 - Cabinet Work Programme;
 - Discussions with Corporate Directors;
 - Performance Team regarding the timing of performance information.
- 3.3 There are items where there is a statutory duty for Policy Framework documents to be considered by Scrutiny, e.g., the MTFS including draft budget proposals scheduled for consideration in January 2026, following which the Committee will make conclusions and recommendations in a report on the overall strategic overview of Cabinet's draft Budget proposals to the meeting of Cabinet in February 2026.
- 3.4 An effective Forward Work Programme will identify the issues that the Committee wishes to focus on during the year and provide a clear plan. However, at each meeting the Committee will have an opportunity to review this as the Forward Work Programme Update will be a standing item on the Agenda, detailing which items are scheduled for future meetings and be requested to clarify any information to be included in reports and the list of invitees. The Forward Work Programme will remain flexible and will be revisited at each COSC meeting and any updated information gathered from Forward Work Programme Planning meetings with Corporate Directors.

Identification of Further Items

- 3.5 The Committee are reminded that the Scrutiny selection criteria used by Scrutiny Committee Members to consider, select and prioritise items emphasises the need to consider issues such as impact, risk, performance, budget and community perception when identifying topics for investigation to maximise the impact scrutiny can have on a topic and the outcomes for people. The criteria which can help the Committee come to a decision on whether to include a referred topic, are set out below:

Recommended Criteria for Selecting Scrutiny Topics:

PUBLIC INTEREST:	The concerns of local people should influence the issues chosen for scrutiny;
ABILITY TO CHANGE:	Priority should be given to issues that the Committee can realistically influence, and add value to;
PERFORMANCE:	Priority should be given to the areas in which the Council is not performing well;
EXTENT:	Priority should be given to issues that are relevant to all or large parts of the County Borough, or a large number of the Authority's service users or its population;
REPLICATION:	Work programmes must take account of what else is happening in the areas being considered to avoid duplication or wasted effort.

Reasons to Reject Scrutiny Topics:

- The issue is already being addressed / being examined elsewhere and change is imminent.
- The topic would be better addressed elsewhere (and can be referred there).
- Scrutiny involvement would have limited / no impact upon outcomes.
- The topic may be sub-judice or prejudicial.
- The topic is too broad to make a review realistic and needs refining / scoping.
- New legislation or guidance relating to the topic is expected within the next year.
- The topic area is currently subject to inspection or has recently undergone substantial change / reconfiguration.

Corporate Parenting

- 3.6 Corporate Parenting is the term used to describe the responsibility of a local authority towards care experienced children and young people. This is a legal responsibility given to local authorities by the Children Act 1989 and the Children Act 2004. The role of the Corporate Parent is to seek for children in public care the outcomes every good parent would want for their own children. The Council as a whole is the 'Corporate Parent', therefore all Members have a level of responsibility for care experienced children and young people in Bridgend.
- 3.7 In this role, it is suggested that Members consider how each item they consider affects care experienced children and young people, and in what way can the Committee assist in these areas.
- 3.8 Scrutiny Champions can greatly support the Committee in this by advising them of the ongoing work of the Cabinet Committee Corporate Parenting and particularly any decisions or changes which they should be aware of as Corporate Parents.
- 3.9 The Forward Work Programme for COSC is attached as **Appendix A** for the Committee's consideration.

- 3.10 The Recommendations Monitoring Action Sheet to track outstanding responses to the Committee's recommendations made at previous meetings is attached as **Appendix B**.

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 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 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:
- Long-term - The approval of this report will assist in the planning of Scrutiny business in both the short-term and in the long-term on its policies, budget and service delivery.
 - Prevention - The early preparation of the Forward Work Programme allows for the advance planning of Scrutiny business where Members are provided an opportunity to influence and improve decisions before they are made by Cabinet.
 - Integration - The report supports all the wellbeing objectives.
 - Collaboration - Consultation on the content of the Forward Work Programme has taken place with the Corporate Management Board, Heads of Service and Elected Members.
 - Involvement - Advanced publication of the Forward Work Programme ensures that stakeholders can view topics that will be discussed in Committee meetings and are provided with the opportunity to engage.
- 5.2 When setting its Forward Work Programme, the Committee should consider how each item they propose to scrutinise assists in the achievement of the Council's 4 Wellbeing Objectives under the **Well-being of Future Generations (Wales) Act 2015** as follows:
1. A prosperous place with thriving communities
 2. Creating modern, seamless public services
 3. Enabling people to meet their potential
 4. Supporting our most vulnerable

6. Climate Change and Nature Implications

- 6.1 The Committee should consider how each item they scrutinise affects climate change, the Council's Net Zero Carbon 2030 target and how it meets the Council's commitments to protect and sustain the environment over the long term. There are no Climate Change or Nature Implications arising from this report.

7. Safeguarding and Corporate Parent Implications

- 7.1 The Committee should consider how each item they scrutinise affects care experienced children and young people, and in what way the Committee can assist in these areas. Safeguarding is everyone's business and means protecting peoples' health, wellbeing and human rights, and enabling them to live free from harm, abuse and neglect. There are no Safeguarding and Corporate Parent Implications arising from this report.

8. Financial Implications

- 8.1 There are no financial implications arising from this report.

9. Recommendation

- 9.1 The Committee is recommended to:
- a) Consider and approve the Forward Work Programme for this Committee in **Appendix A**.
 - b) Identify any specific information the Committee wishes to be included in the items for the next two meetings, including invitees they wish to attend.
 - c) Identify whether there are presently any further items for consideration on the Forward Work Programme having regard to the selection criteria in paragraph 3.5 of this report.
 - d) Note the Recommendations Monitoring Action Sheet in **Appendix B** to track outstanding responses to the Committee's recommendations made at previous meetings;
 - e) Note that the proposed draft Forward Work Programmes for the other Overview and Scrutiny Committees will be reported to the next meeting of COSC for information, following consideration in their July Committee meetings.

Background documents

None.

Corporate Overview and Scrutiny Committee
2025-26 Draft Forward Work Programme

Monday 30 June 2025 at 10.00am		
Report Topics	Any Specific Information Requested	Invitees
Revenue Budget Outturn 2024-25		<u>All Cabinet Members</u> <u>Officers</u> Chief Executive; Chief Officer - Finance, Housing and Change; Corporate Director – Education, Early Years and Young People; Corporate Director - Social Services and Wellbeing; Corporate Director – Communities; Chief Officer Legal and Regulatory Services, HR & Corporate Policy.
Scrutiny Budget Working Group		N/A
Corporate Parenting Champion Nomination		N/A
Nominations to the Joint Overview and Scrutiny Arrangements following Transition to a Single Public Services Board (PSB) for Cwm Taf Morgannwg		N/A
Forward Work Programme Update		N/A

Thursday 24 July 2025 at 10.00am		
Report Topics	Any Specific Information Requested	Invitees
Budget Monitoring 2025-26 – Quarter 1 Revenue Forecast		<u>All Cabinet Members</u> <u>Officers</u> Chief Executive; Chief Officer - Finance, Housing and Change; Corporate Director – Education, Early Years and Young People; Corporate Director - Social Services and Wellbeing; Corporate Director – Communities; Chief Officer Legal and Regulatory Services, HR & Corporate Policy.

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Quarter 4 / Year End Performance 2024-25		As above plus: Corporate Policy and Public Affairs Manager; Corporate Performance Manager; and Group Manager – Human Resources and Organisational Development.
Corporate Self-Assessment 2024-25		As above.

Thursday 11 September 2025 at 10.00am

Report Topics	Any Specific Information Requested	Invitees
Director of Social Services Annual Report 2024/25	Pre-Decision	<u>Cabinet Member</u> Deputy Leader of the Council and Cabinet Member for Social Services, Health and Wellbeing; <u>Officers</u> Corporate Director - Social Services and Wellbeing; Head of Adult Social Care; Head of Children and Family Services. Group Manager - Prevention and Wellbeing; Group Manager – Commissioning; and Group Manager - Business Strategy, Performance & Improvement.
Social Services Complaints and Representations	Pre-Decision	<u>Cabinet Member</u> Deputy Leader of the Council and Cabinet Member for Social Services, Health and Wellbeing; <u>Officers</u> Corporate Director - Social Services and Wellbeing.
Digital Strategy - TBC		<u>Cabinet Members</u> Cabinet Member(s) for Resources <u>Officers</u> Chief Executive; and Chief Officer - Finance, Housing and Change
Scrutiny Annual Report 2024/25		N/A

Thursday 23 October 2025 at 10.00am

Report Topics	Any Specific Information Requested	Invitees
Budget Monitoring 2025-26 – Quarter 2 Revenue Forecast		<u>All Cabinet Members</u> Chief Executive; Chief Officer - Finance, Housing and Change;

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		Corporate Director – Education, Early Years and Young People; Corporate Director - Social Services and Wellbeing; Corporate Director – Communities; and Chief Officer Legal and Regulatory Services, HR & Corporate Policy.
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Thursday 11 December 2025 at 10.00am

Report Topics	Any Specific Information Requested	Invitees
Quarter 2 Performance Report 2025-26		<u>All Cabinet Members</u> <u>Officers</u> Chief Executive; Chief Officer - Finance, Housing and Change; Corporate Director – Education, Early Years and Young People; Corporate Director - Social Services and Wellbeing; Corporate Director – Communities; Chief Officer Legal and Regulatory Services, HR & Corporate Policy; Corporate Policy and Public Affairs Manager; Corporate Performance Manager; Head of Partnership Services; and Group Manager – Human Resources and Organisational Development.
Corporate Plan Delivery Plan 2025-26		As above.

Thursday 15 January 2026 at 10.00am

Report Topics	Any Specific Information Requested	Invitees
Draft Medium Term Financial Strategy 2026-27 to 2029-30 and Budget Proposals		<u>All Cabinet Members</u> <u>Officers</u> Chief Executive; Chief Officer - Finance, Housing and Change; Corporate Director – Education, Early Years and Young People; Corporate Director - Social Services and Wellbeing; Corporate Director – Communities; Chief Officer Legal and Regulatory Services, HR & Corporate Policy;

APPENDIX A

		Corporate Policy and Public Affairs Manager; Deputy Head of Finance; and Finance Manager – Social Services & Wellbeing / Chief Executive's Directorate; and Finance Manager – Education, Early Years and Young People / Communities Directorate.
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Tuesday 27 January 2026 at 10.00am		
Report Topics	Any Specific Information Requested	Invitees
Scrutiny Recommendations on Medium Term Financial Strategy 2026-27 to 2029-30 and Draft Budget Consultation Process		<u>Cabinet Member</u> Cabinet Member for Finance and Performance; Cabinet Member(s) for Resources; and <u>Officer</u> Chief Officer - Finance, Housing and Change
Capital Strategy 2026-27 onwards		<u>Cabinet Members</u> Leader of the Council; Cabinet Member for Finance and Performance; <u>Officers</u> Chief Officer Finance, Housing and Change; and Group Manager – Chief Accountant
Budget Monitoring 2025-26 – Quarter 3 Revenue Forecast		<u>All Cabinet Members</u> <u>Officers</u> Chief Executive; Chief Officer – Finance, Housing and Change; Corporate Director – Education, Early Years and Young People; Corporate Director - Social Services and Wellbeing; Corporate Director – Communities; and Chief Officer Legal and Regulatory Services, HR & Corporate Policy.

Thursday 26 March 2026 at 10.00am

Report Topics	Any Specific Information Requested	Invitees
Quarter 3 Performance Report 2025-26		<u>All Cabinet Members</u> <u>Officers</u> Chief Executive; Chief Officer - Finance, Housing and Change; Corporate Director - Education and Early Years and Young People; Corporate Director - Social Services and Wellbeing; Corporate Director – Communities; Chief Officer Legal and Regulatory Services, HR & Corporate Policy; Corporate Policy and Public Affairs Manager Corporate Performance Manager; Head of Partnership Services; and Group Manager – Human Resources and Organisational Development.
Corporate Plan Delivery Plan Review 2025-26		<u>Cabinet Members</u> Leader of the Council; Cabinet Member for Finance and Performance; <u>Officers</u> Chief Executive; Chief Officer Finance, Housing and Change; Corporate Policy and Public Affairs Manager.

Reports to be Scheduled

Report Topics	Any Specific Information Requested	Invitees
Staff Survey	Including responses, outcome of staff focus groups and future staff surveys.	<u>Cabinet Members</u> Leader of the Council; Cabinet Member for Finance and Performance; <u>Officers</u> Chief Executive; Group Manager – Communications and Public Affairs
Engagement and Participation Strategy Action Plan	Update to be provided within 12 months	TBC
Workforce Strategy Monitoring Action Plans	To monitor progress / implementation of Action Plans	<u>Cabinet Members</u> Leader of the Council; Deputy Leader of Council and Cabinet Member for Social Services, Health and Wellbeing;

		Cabinet Member for Finance and Performance; <u>Officers</u> Chief Executive; Chief Officer Legal and Regulatory Services, HR & Corporate Policy; Group Manager – Human Resources Organisational Development
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Recommendation from the Committee formerly known as SOSC 1 – 8 May 2025

The Committee discussed the financial challenges for the local authority, the number of schools with deficit budgets and the impact these are having on the reduction of therapeutic and other support staff.

a. Members expressed concern regarding the impact the complex budgetary situation was having on counselling and early intervention services and **recommended** that a referral be made to the Corporate Overview and Scrutiny Committee (COSC) to ensure that these matters are prioritised for funding in the next budget round and that if budgetary savings are required that these are found elsewhere.

b. In addition, given the adoption of a minimum operating model across all projects funded by the Shared Prosperity Fund, the directorate's Inspire+ projects, which provide vital support to vulnerable pupils and young people, many of whom face behavioural challenges and/or attendance issues in both school and community settings, Members **requested** the figures on how the fund is split between directorates be shared with COSC / Scrutiny Budget Working Group.

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CORPORATE OVERVIEW AND SCRUTINY COMMITTEE - RECOMMENDATIONS MONITORING ACTION SHEET 2024-25

Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
9 September 2024	Director of Social Services Annual Report 2023/24	The Committee requested that the Recovery Plan considered by the Social Services Improvement Board be circulated to Members of the Committee.	Corporate Director - Social Services and Wellbeing/ Scrutiny.	Circulating for response. Chased.	
24 October 2024	Budget Monitoring 2024-25 - Quarter 2 Revenue Forecast	The Committee expressed concern regarding the risk that next year, many schools could have deficit budgets of over 5% which require a deficit recovery plan, as schools' budgets are being based on this year's figures and not taking account of further indicative budget reduction proposals for 2025-26. The Committee therefore recommended that future reports relating to the budget include projected deficit figures for schools accordingly.	Chief Officer – Finance, Performance and Change / Corporate Director - Education, Early Years and Young People	Circulating for response. Chased.	
24 October 2024	Budget Monitoring 2024-25 - Quarter 2 Revenue Forecast	The Committee recommended that the next quarterly report include details of the actions taken by Cabinet and the Corporate Management Board, to find the full required savings in respect of non-	Corporate Management Board	Circulating for response. Chased.	

APPENDIX B

Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
		essential recruitment and expenditure.			
24 October 2024	Budget Monitoring 2024-25 - Quarter 2 Revenue Forecast	The Committee requested additional information on the funding arrangements with, and the steps being undertaken to ensure fair contributions from, partner organisations, including the Health Board, for the provision of residential placements and the delivery of social care.	Corporate Director – Social Services and Wellbeing	Circulating for response. Chased.	
15 Jan 2025	Medium Term Financial Strategy 2024-25 to 2027-28	The Committee recommended that a letter be sent on behalf of the Committee to Welsh Government and the UK Government regarding the following: a. expressing that national policy commitments resulting from legislative changes should be fully funded both in terms of capital funding and ongoing revenue funding including a commitment to fund employer national insurance payments for individuals employed by agencies who provide services to the Council which currently results in a £1.5m cost pressure;	Chair/ Scrutiny	Letter sent to Welsh Government. Response chased.	

APPENDIX B

Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
		and b. expressing concern regarding the repeated lateness of the settlement and requesting a commitment to bring forward the settlement date and to request that consideration be given to providing indicative multi-year settlements.			
15 Jan 2025	Medium Term Financial Strategy 2024-25 to 2027-28	The Committee recommended that a letter be sent on behalf of the Committee to Welsh Government and the Department for Work and Pensions strongly recommend that they implement auto-enrolment of individuals to all benefits to which they are eligible/entitled when they apply for another benefit.	Chair/ Scrutiny	ACTIONED – response and information circulated 3 June 2025.	Follow link here
15 Jan 2025	Medium Term Financial Strategy 2024-25 to 2027-28	The Committee requested Officer responses as to whether the population growth in the county borough was creating more demand in specific areas, e.g. whether families with children with special needs were moving into the area to take up the offer of in-county special schools offer or whether older people were relocating to the area.	Chief Executive	ACTIONED – response and information circulated 23 June 2025.	Follow link here

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Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
15 January 2025	Medium Term Financial Strategy 2024-25 to 2027-28	The Committee requested a copy of the report being presented to the Shared Regulatory Services Joint Committee at the end of January 2025 to assist the Committee in identifying statutory and non-statutory services provided by Regulatory and Corporate Services.	Chief Officer – Legal and Regulatory Services, HR and Corporate Policy	ACTIONED – response and information circulated 23 June 2025.	Follow link here
28 January 2025	Medium Term Financial Strategy 2024-25 to 2027-28 and Draft Budget Consultation Process	The Committee expressed concern regarding the perceived discrepancy between the Welsh Government promoting a 4% investment in education and Bridgend proposing a 1% cut to school budgets. The Committee were advised that Bridgend's allocation from the additional Welsh Government funding for education in Wales equated to around £10.8m. The Committee requested a copy of the letter from the Cabinet Secretary for Education detailing the breakdown of this allocation referred to by the Corporate Director – Education, Early Years and Young People.	Corporate Director – Education, Early Years and Young People	Circulating for response. Chased.	
28 January 2025	Medium Term Financial Strategy 2024-	The Committee expressed concern regarding the impact of falling pupil roll numbers on funding for schools	Corporate Director – Education, Early	Circulating for response. Chased.	

APPENDIX B

Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
	25 to 2027-28 and Draft Budget Consultation Process	and requested the pupil numbers on roll for past years and a projection of future numbers including the Pupil Admission Number (PAN) for each school.	Years and Young People		
28 January 2025	Medium Term Financial Strategy 2024-25 to 2027-28 and Draft Budget Consultation Process	The Committee requested a written response providing an estimated value of the revenue lost, at the Rhiw Car Park, as a result of the car park barrier remaining up all day.	Chief Officer – Finance, Housing and Change / Corporate Director - Communities	ACTIONED – response and information circulated 23 June 2025.	Follow link here
28 January 2025	Medium Term Financial Strategy 2024-25 to 2027-28 and Draft Budget Consultation Process	The Committee were advised that the Council's charging regime for car parking, including the free parking offers, were being reviewed. The Committee requested that the Subject Overview and Scrutiny Committee 3 consider requesting a report detailing the outcome of the exercise referred to above and that such report demonstrates the difference in revenue between the free parking period and a full charging model.	Scrutiny / SOSC 3	ACTIONED - Scrutiny actioned in Forward Work Planning meeting with Scrutiny Chair and Corporate Director.	Actioned
28 January 2025	Budget Monitoring	Whilst discussing significant overspends in some services, the	Chief Officer – Finance,	ACTIONED – response and	Follow link here

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Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
	2024-25 - Quarter 3 Revenue Forecast	Committee expressed concern that the Council's projected overall underspend position masks significant overspends in some areas and recommended that the Authority should continue the push to try to reduce and address these overspends.	Housing and Change /	information circulated 23 June 2025.	
28 January 2025	Budget Monitoring 2024-25 - Quarter 3 Revenue Forecast	The Committee expressed concern that the White Paper from Welsh Government regarding home to school transport is still awaited and the impact being a significant recurring overspend on service provision. The Committee recommended that transformation of the service was required and that there needed to be work and education around the public bus network. The Committee also expressed concern, that a Welsh Government review of bus network services and franchising will commence in North Wales so that a review of Bridgend is not scheduled for at least two years.	Corporate Director – Education, Early Years and Young People	Circulating for response. Chased.	
28 January 2025	Budget Monitoring 2024-25 - Quarter 3	The Committee expressed concern regarding the significant increase in demand for learners with additional learning needs (ALN)	Corporate Director – Education, Early	Circulating for response. Chased.	

APPENDIX B

Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
	Revenue Forecast	driving the overspend position in this area and queried whether the reasons for the increase in demand and the projected likely demand for ALN services were sufficiently understood. The Committee requested a copy of the Estyn review report referred to by the Corporate Director – Education, Early Years and Young People regarding the Additional Learning Needs and Education Tribunal (Wales) Act 2018 which considered some areas of learning needs and support required for learners and which provided a helpful summary of themes from a number of schools across Wales.	Years and Young People		
28 January 2025	Budget Monitoring 2024-25 - Quarter 3 Revenue Forecast	The Committee discussed legacy issues from the pandemic impacting on pupil behaviour leading to an increase in exclusions and the significant increase in demand for ALN provision, expressed concern that the increase in demand may not be solely due to pandemic and asked whether further work was necessary to fully understand all of	Scrutiny / SOSC 1	ACTIONED - Scrutiny actioned in Forward Work Planning meeting with Scrutiny Chair and Corporate Director.	Pupil Behaviour, Attendance and Exclusions Report reported to SOSC 1 on 8 May 2025.

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Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
		the reasons driving the increase in demand and overspend in ALN services. The Committee were advised that educational specialists in Welsh Government were undertaking a detailed piece of work looking at the reasons for the additional demand and requested that the Subject Overview and Scrutiny Committee 1 consider requesting a report detailing the outcome of the exercise referred to above, when available, or to include it in the report on Behaviour scheduled to that Committee, as appropriate.			
17 March 25	Quarter 3 Performance 2024-25, Corporate Plan Delivery Plan Refresh Position Statement and Update on the Disabled	Various	-	ACTIONED – response and information circulated 15 May 2025.	Follow link here

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Date of Meeting	Agenda Item	Action	Responsibility	Outcome	Response
	Facilities Grant Service Scrutiny Review Forward Work Programme Update				

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