

# Public Document Pack

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

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



*Rydym yn croesawu gohebiaeth yn Gymraeg. 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: Democratic Services

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

**Dyddiad/Date:** Wednesday, 28 January 2026

Dear Councillor,

### **CABINET**

A meeting of the Cabinet will be held Hybrid in the Council Chamber - Civic Offices, Angel Street, Bridgend, CF31 4WB / remotely via Microsoft Teams on **Tuesday, 3 February 2026 at 14:30**.

### **AGENDA**

#### **1 Apologies for Absence**

To receive apologies for absence from Members.

#### **2 Declarations of Interest**

To receive declarations of personal and prejudicial interest (if any) from Members/Officers in accordance with the provisions of the Members' Code of Conduct adopted by Council from 1 September 2008.

#### **3 Approval of Minutes**

5 - 10

To receive for approval the Minutes of 13/01/26

#### **4 Scrutiny Recommendation from Communities, Environment and Housing Overview and Scrutiny Committee**

11 - 14

#### **5 Medium Term Financial Strategy 2026-27 to 2029-30 and Draft Budget Consultation Process**

15 - 22

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6	<u>Shared Lives Scheme</u>	23 - 30
7	<u>Houses in Multiple Occupation - Draft Supplementary Planning Guidance</u>	31 - 94
8	<u>Update on the UK Government's Pride In Place Impact Fund Allocation for Bridgend County Borough</u>	95 - 100
9	<u>School Admissions Policy 2027-2028 and Co-ordinated Admissions Arrangements 2028-2029</u>	101 - 186
10	<u>School Modernisation Programme Porthcawl Welsh-Medium Seedling School and Childcare</u>	187 - 192
11	<u>Budget Monitoring 2025-2026 - Quarter 3 Revenue Forecast</u>	193 - 230
12	<u>Capital Programme Quarter 3 Update 2025-26</u>	231 - 248
13	<u>Cabinet, Council and Overview and Scrutiny Committees Forward Work Programmes</u>	249 - 266
14	<u>Urgent Items</u>	
	To consider any items of business that by reason of special circumstances the chairperson is of the opinion should be considered at the meeting as a matter of urgency in accordance with paragraph 2.4 (e) of the Cabinet Procedure Rules within the Constitution.	
15	<u>Exclusion of the Public</u>	
	The following item is not for publication as it contains exempt information as defined in Paragraphs 14 and 16 of Part 4 and Paragraph 21 of Part 5, Schedule 12A of the Local Government Act 1972, as amended by the Local Government (Access to Information) (Variation) (Wales) Order 2007.	
	If following the application of the public interest test Cabinet resolves pursuant to the Act to consider this item in private, the public will be excluded from the meeting during such consideration.	
16	<u>Bridgend Town Centre Strategic Property Acquisition</u>	267 - 280

**Note: This will be a Hybrid meeting and Members and Officers will be attending in the Council Chamber, Civic Offices, Angel Street Bridgend / Remotely via Microsoft Teams. The meeting will be recorded for subsequent transmission via the Council's internet site which will be available as soon as practicable after the meeting. If you would like to view this meeting live, please contact [cabinet\\_committee@bridgend.gov.uk](mailto:cabinet_committee@bridgend.gov.uk) or tel. 01656 643148 / 643694 / 643513 / 643159.**

Yours faithfully  
**K Watson**

Chief Officer, Legal and Regulatory Services, HR and Corporate Policy

Councillors:

E L P Caparros

G Haines

M J Evans

N Farr

J Gebbie

M Jones

JC Spanswick

HM Williams

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CABINET - TUESDAY, 13 JANUARY 2026

MINUTES OF A MEETING OF THE CABINET HELD HYBRID IN THE COUNCIL CHAMBER - CIVIC OFFICES, ANGEL STREET, BRIDGEND, CF31 4WB / REMOTELY VIA MICROSOFT TEAMS. ON TUESDAY, 13 JANUARY 2026 AT 14:30

Present

Councillor JC Spanswick – Chairperson

J Gebbie  
M Jones

HM Williams  
GC Haines

E L P Caparros

M J Evans

Present Virtually

N Farr

Officers:

Jake Morgan  
Nimi Chandrasena  
Carys Lord  
Claire Marchant  
Janine Nightingale  
Kelly Watson  
Michael Pitman  
Gaynor Thomas  
Raeanna Grainger

Chief Executive  
Democratic Services Officer - Support  
Chief Officer - Finance, Housing & Change  
Corporate Director - Social Services and Wellbeing  
Corporate Director - Communities  
Chief Officer - Legal & Regulatory Services, HR & Corporate Policy  
Technical Support Officer – Democratic Services  
School Programme Manager  
Group Manager, IAA & Safeguarding

**575. Apologies for Absence**

Decision Made	None
Date Decision Made	13 January 2026

**576. Declarations of Interest**

Decision Made	None
Date Decision Made	13 January 2026

**577. Approval of Minutes**

Decision Made	<u>RESOLVED:</u>	That the minutes of the 16/12/2025 be approved as a true and accurate record.
Date Decision Made	13 January 2026	

**578. Children's Residential Home**

Decision Made	<p>The Corporate Director of Social Services and Wellbeing presented a report which asked Cabinet to approve a capital budget of £1,620,450 for the acquisition and refurbishment of a children's residential home to be initially funded from Bridgend County Borough Council (BCBC) resources. The initiative aimed to provide high quality, in-county provision for children with complex needs, reducing the reliance on costly and distant out-of-county placements.</p> <p>A Member asked about the recruitment strategy for specialized staff required for such complex care. The Corporate Director of Social Services and Wellbeing confirmed that a robust recruitment and retention package was in place, emphasizing that being an employer of choice in the social care sector was a</p>
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	<p>priority to ensure the home was fully staffed.</p> <p><u>RESOLVED:</u></p> <p>That Cabinet:</p> <ul style="list-style-type: none"><li>• agreed that a report be presented to Council for approval of a capital budget of £1,620,450 to be included in the Council's Capital Programme for the acquisition and refurbishment of a children's residential home to be initially funded from Bridgend County Borough Council (BCBC) resources, on the assumption that some or all of the costs were recovered via the Welsh Government Housing with Care Fund, and;</li><li>• noted the risks associated with Welsh Government approval and, subject to Council approval, supported proceeding "at risk" with the acquisition to meet the 2025/26 timeline, with refurbishment planned for 2026/27.</li></ul>
Date Decision Made	13 January 2026

#### **579. Annual Corporate Safeguarding Report 2024/2025**

Decision Made	<p>The Chief Executive presented the annual report on Corporate Safeguarding which updated Cabinet on the council's performance in protecting vulnerable children and adults. He noted a high level of compliance with mandatory safeguarding training across the workforce but identified areas for further improvement in contractor monitoring. The full report was attached at Appendix 1.</p> <p>A member questioned how the council ensures that third-party contractors adhere to the same rigorous safeguarding standards as internal staff. The Chief Executive explained that safeguarding clauses are standard in all council contracts, and procurement teams have increased their audit frequency to verify compliance.</p>
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	<u>RESOLVED:</u>  That Cabinet approved the 2024/25 Annual Corporate Safeguarding Report.
Date Decision Made	13 January 2026

**580. School Modernisation Programme Replacement Heronsbridge School -  
Modification to school opening**

Decision Made	<p>The Cabinet Member Education and Youth Services presented a report which sought approval to modify the opening date of the replacement Heronsbridge School to the start of the Autumn term 2028.</p> <p>He explained that delays were caused by increased costs and the complexities of appointing a design and build contractor however Kier Construction had now progressed the design and programme. The revised date has been agreed upon by the headteacher, the governing body, and Welsh Government officials.</p> <p>The following questions were posed by Cabinet Members:</p> <ul style="list-style-type: none"><li>• Were families and carers are being kept informed of the changes.</li><li>• Did the revised timeline allows sufficient time for the school to manage the transition.</li></ul> <p>Responses were provided by the Sustainable Communities for Learning Manager.</p> <p><u>RESOLVED:</u>  That Cabinet approved the modification of the opening date of the replacement Heronsbridge School to the beginning of the autumn term 2028.</p>
Date Decision Made	13 January 2026

**581. Medium Term Financial Strategy 2026-27 to 2029-30**

Decision Made	<p>The Cabinet Member for Finance and Performance presented a report which outlined the MTFS and revenue budget for consultation.</p> <p>He advised that the Council received a late announcement of additional funding from the Welsh Government, which improves the financial position. A proposed uplift of £4 million for education. There will be no 1% cut for education this year or next year, responding to concerns from school governors. He advised that the reserves were currently just under the recommended 5% target.</p> <p>The following points were discussed:</p> <p>Additional funding was welcomed but the public were encouraged to participate in the budget consultation, which was currently open.</p> <p>The Leader reiterated the commitment to not cutting the school budgets. The improved settlement will help towards public spaces and highway safety.</p> <p><u>RESOLVED:</u></p> <p>That Cabinet submits for consultation the 2026-27 annual budget and development of the MTFS 2026-27 to 2029-30, as set out in the report, prior to presenting a final version for approval by Council on February 25, 2026.</p>
Date Decision Made	13 January 2026

**582. Urgent Items**

Decision Made	None
Date Decision Made	13 January 2026

**583. Exclusion of the Public**

Decision Made	<u>RESOLVED:</u>	<p>The following item was not for publication as it contained exempt information as defined in Paragraphs 14 of Part 4 and Paragraph 21 of Part 5, Schedule 12A of the Local Government Act 1972, as amended by the Local Government (Access to Information) (Variation) (Wales) Order 2007.</p> <p>Following the application of the public interest test Cabinet resolved pursuant to the Act to consider this item in private, with the public being excluded from the meeting during such consideration.</p>
Date Decision Made	13 January 2026	

**584. Approval of Exempt Minutes**

Decision Made	<u>RESOLVED:</u>	That the minutes of the 16/12/2025 be approved as a true and accurate record.
Date Decision Made	13 January 2026	

To observe further debate that took place on the above items, please click this [link](#)

The meeting closed at 15:20

# Agenda Item 4

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>SCRUTINY RECOMMENDATION FROM COMMUNITIES, ENVIRONMENT AND HOUSING OVERVIEW AND SCRUTINY COMMITTEE</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>COMMUNITIES, ENVIRONMENT AND HOUSING OVERVIEW AND SCRUTINY COMMITTEE</b>
<b>Responsible Officer:</b>	<b>MERYL LAWRENCE SENIOR DEMOCRATIC SERVICES OFFICER – SCRUTINY</b>
<b>Policy Framework and Procedure Rules:</b>	<b>This report has no effect on the Policy Framework and Procedure Rules.</b>
<b>Executive Summary:</b>	<p><b>The report presents Cabinet with the recommendation of the Communities, Environment and Housing Overview and Scrutiny Committee from their meeting held on 3 November 2025, during consideration of a report on the Net Zero Strategy.</b></p> <p><b>Cabinet is requested to consider and respond to the recommendation of the Communities, Environment and Housing Overview and Scrutiny Committee.</b></p>

## 1. Purpose of Report

- 1.1 The purpose of this report is to present Cabinet with the recommendation of the Communities, Environment and Housing Overview and Scrutiny Committee from their meeting held on 3 November 2025, during consideration of a report on the Net Zero Strategy.

## 2. Background

- 2.1 At its meeting on 3 November 2025, the Communities, Environment and Housing Overview and Scrutiny Committee considered a report on the [Net Zero Strategy](#), when Members discussed the review of the Strategy, details of the public consultation to be undertaken upon the revised Strategy, and expressed concern regarding the projected cost to achieve net zero as set out in the financial implications of the report of approximately £109.65m.

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

3.1 Following detailed consideration and discussions with a Cabinet Member and Senior Officers, the Committee made the following recommendation:

The Committee expressed concern regarding the unlikelihood of meeting the 2030 Net Zero target given the funding for the identified cost of £109.65 million for implementation that would be needed and **recommended** that Cabinet reconsider its commitment to the 2030 target, request the Welsh Government (WG) to review their target for Net Zero and provide guidance on how to proceed.

3.2 Cabinet is requested to consider and respond to the recommendation above.

### **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. The potential future reconsideration of the commitment would have wider climate change and nature implications.

**7. Safeguarding and Corporate Parent Implications**

7.1 There are no safeguarding or corporate parent implications arising from this report.

**8. Financial Implications**

8.1 There are no direct financial implications arising from this report. The potential future reconsideration of the commitment could have wider financial implications.

**9. Recommendation**

9.1 Cabinet is requested to consider and respond to the recommendation of the Communities, Environment and Housing Overview and Scrutiny Committee.

**Background documents**

None.

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# Agenda Item 5

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>MEDIUM TERM FINANCIAL STRATEGY 2026-27 TO 2029-30 AND DRAFT BUDGET CONSULTATION PROCESS</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CORPORATE OVERVIEW AND SCRUTINY COMMITTEE</b>
<b>Responsible Officer:</b>	<b>MERYL LAWRENCE SENIOR DEMOCRATIC SERVICES OFFICER – SCRUTINY</b>
<b>Policy Framework and Procedure Rules:</b>	<b>The report relates to the role of the Corporate Overview and Scrutiny Committee as Consultee in respect of the budget setting process in line with the Budget Policy and Framework Procedure Rules.</b>
<b>Executive Summary:</b>	<p><b>The report presents Cabinet with the findings and recommendations of the Corporate Overview and Scrutiny Committee (COSC) as the Scrutiny Committee with overall responsibility for budget scrutiny, in relation to the draft Medium Term Financial Strategy (MTFS) including the proposed budget pressures, budget reduction proposals and the proposals for spending the additional funding announced by Welsh Government in December.</b></p> <p><b>Cabinet is requested to consider and respond to the Recommendations of the Corporate Overview and Scrutiny Committee, through the MTFS 2026-27 to 2029-30.</b></p>

## 1. Purpose of Report

- 1.1 The purpose of this report is to present Cabinet with the findings and recommendations of the Corporate Overview and Scrutiny Committee (COSC), as the Scrutiny Committee with overall responsibility for budget scrutiny, in relation to the draft Medium Term Financial Strategy (MTFS) including the proposed budget pressures and budget reduction proposals the proposals for spending the additional funding announced by Welsh Government in.

## 2. **Background**

### Scrutiny Budget Working Group

- 2.1 On 9 April 2025, Council approved that a working group be established with representatives from all Scrutiny Committees and chaired by the Chair of the Corporate Overview and Scrutiny Committee, to feed back to COSC, as the Scrutiny Committee with overall responsibility for budget scrutiny.
- 2.2 On 24 July 2025, COSC considered a report on the work undertaken in consultation with Scrutiny Chairs on the proposed arrangements for the Scrutiny Budget Working Group and any comments received following consultation with Groups and individual Independent Members and agreed the:
  - a. Size, composition, and nominations process for the Working Group;
  - b. Draft Terms of Reference;
  - c. Proposed Structure of the Scrutiny Budget Working Group and Draft outline of schedule of meetings.
- 2.3 Four Deep Dive Groups were established to scrutinise each of the Directorates and met once each in September and October and the Chairs presented findings to the Scrutiny Budget Working Group on 4 November 2025. The consolidated recommendations were then presented to the Steering Group on 17 November 2025.
- 2.4 On 16 December 2025, Cabinet was asked to consider and respond to the Recommendations of the Scrutiny Budget Working Group as agreed by COSC at their meeting of 11 December 2025 and to consider them during the development of the draft budget proposals and MTFS.

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

- 3.1 At its meeting on 27 January 2026, COSC considered the draft Medium Term Financial Strategy 2026-27 to 2029-30, which sets out the spending priorities of the Council, key investment objectives and budget areas targeted for necessary savings which included a financial forecast for 2026-2030, a detailed draft revenue budget for 2026-27, the proposals for spending the additional funding announced by Welsh Government.
- 3.2 The Committee agreed Recommendations to submit to Cabinet, as part of the budget consultation process 2026-27 and a table of the Recommendations are attached in **Appendix A** for Cabinet's response.

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

- 4.1 A high level Equality Impact Assessment (EIA) will be carried out and included within the Final MTFS in February 2026. The high level EIA considers the impact of the strategy, policy or proposal on the nine protected characteristics, the Socio-economic Duty and the use of the Welsh Language.

4.2 The proposals contained within this report cover a wide range of services and it is inevitable that the necessary budget reductions will impact on the local population in different ways. In developing these proposals, consideration has been given to their potential impact on protected groups within the community and on how to avoid a disproportionate impact on people within these groups.

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

5.1 The Well-being of Future Generations (Wales) Act 2015 provides a framework for embedding sustainable development principles within the activities of Council and has major implications for the long-term planning of finances and service provision. The 7 well-being goals identified in the Act have driven the Council's 4 well-being objectives.

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 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 consideration and approval of this report will assist in the budget setting process for both the short-term and in the long-term.
- Prevention - The consideration and approval of this report will assist in the budget setting process by approving and shaping preventative measures provided by Directorates to generate savings.
- Integration - The Medium Term Financial Strategy links to the Corporate Plan and well-being objectives.
- Collaboration - The consideration and approval of this report will assist in the budget setting process by approving and shaping collaboration and integrated working to generate savings.
- Involvement - Publication of the report ensures that the public and stakeholders can view the work that has been undertaken by Scrutiny members.

## **6. Climate Change and Nature Implications**

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

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

7.1 The Medium Term Financial Strategy is aligned with Bridgend County Borough Council's Corporate Parenting Strategy and provides substantial investment in children's services through revenue budget pressures.

## **8. Financial Implications**

8.1 The report relates to Scrutiny responses to the draft MTFS, the budget setting process and the financial implications associated with that.

## **9. Recommendation**

9.1 Cabinet is requested to consider and respond to the Recommendations of the Corporate Overview and Scrutiny Committee, through the Medium Term Financial Strategy 2026-27 to 2029-30.

## **Background documents**

None.

SCRUTINY RECOMMENDATIONS ON THE MEDIUM TERM FINANCIAL STRATEGY 2026-27 TO 2029-30

	Scrutiny Recommendation:	Cabinet Response:	Accepted/ Partially Accepted / Not Accepted:
<b>General - Recommendations:</b>			
1	<u>Council Tax</u> The Committee expressed concern regarding the proposed above inflation increase to Council Tax and the pressure many residents are facing in balancing their household budgets to meet the cost of Council Tax. The Committee therefore strongly <b>recommended</b> that Cabinet considers reviewing its final budget settlement including the current reduction proposals and using the unallocated funding from the uplift to 4.6% to ensure the lowest possible Council Tax.		
2	<u>Narrative re: Demographic</u> With reference to paragraph 3.1.3 of the Cabinet report, the Committee <b>recommended</b> that further narrative be included regarding the changing demographic of the County Borough and that there be a greater breakdown of age ranges, e.g. young people, adults and older people, etc. to further understand the future impact on pupil numbers in schools and the provision of social care for service provision planning.		
3	<u>Fully Funding National Policy Commitments</u> The Committee <b>recommended</b> that all new policy commitments resulting from legislative pressures from UK or Welsh Government (WG) should be fully funded and that the Committee fully support		

SCRUTINY RECOMMENDATIONS ON THE MEDIUM TERM FINANCIAL STRATEGY 2026-27 TO 2029-30

	<b>Scrutiny Recommendation:</b>	<b>Cabinet Response:</b>	<b>Accepted/ Partially Accepted / Not Accepted:</b>
	Cabinet in lobbying Westminster and WG to provide adequate funding.		
<b><u>Education, Early Years and Young People Directorate – Recommendation:</u></b>			
4	<p><u>Transformation in Schools and Education</u></p> <p>The Committee discussed the need for transformation across the whole Council, specifically the schools and education function to see what can be done better and the impact that the funding formula applied to schools budget allocations has on the variances between schools' budget balances and <b>recommended</b>:</p> <ul style="list-style-type: none"> <li>a. that work be undertaken to provide better understanding of the reasons for the variances between schools' budget balances;</li> <li>b. that the funding formula applied to schools' budget allocations be reviewed; and</li> <li>c. that the above be fed back into next year's budget setting together with an update regarding what transformation has taken place in schools and education.</li> </ul>		
<b><u>Communities Directorate - Recommendations:</u></b>			
5	<p><u>Flood Prevention and Public Realm</u></p> <p>The Committee discussed Cabinet's response to Recommendation 17 from the Scrutiny Budget</p>		

SCRUTINY RECOMMENDATIONS ON THE MEDIUM TERM FINANCIAL STRATEGY 2026-27 TO 2029-30

	Scrutiny Recommendation:	Cabinet Response:	Accepted/ Partially Accepted / Not Accepted:
	Working Group which stated, 'the Directorate will look to prioritise spend on flood prevention measures', but highlighted that it is vital reference is made to funding for flood prevention in the MTFS and <b>recommended</b> that Cabinet consider including flood prevention measures within the narrative in <i>NEW 4, Public Realm</i> , in the Additional Final Settlement Budget Pressures, £1.5m.		
6	<p><u>Council's Approach to Flood Prevention and Engineering Services</u></p> <p>Members referred to the link between the Scrutiny Budget Working Group Recommendations 17 (Flood Prevention) and 18 (Engineering Services) and highlighted the opportunity to utilise engineering and nature-based solutions to flood prevention. The Committee <b>recommended</b> that consideration be given to looking at flood prevention with an engineering focus, e.g. planting trees to create wetlands to slow water flow away from housing to prevent flooding, replacing verges with sustainable drainage systems, etc. and being bolder and more proactive in the attraction and use of available grants and funding.</p>		

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# Agenda Item 6

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>SHARED LIVES SCHEME</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CABINET MEMBER FOR SOCIAL SERVICES, HEALTH AND WELLBEING</b>  <b>CORPORATE DIRECTOR – SOCIAL SERVICES AND WELLBEING</b>
<b>Responsible Officer:</b>	<b>JOE BOYLE</b> <b>COMMISSIONING AND SERVICE DEVELOPMENT OFFICER</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the policy framework and procedure rules.</b>
<b>Executive Summary:</b>	<p>This report seeks Cabinet approval to commence consultation regarding proposed changes to the Shared Lives (Adult Placement) Scheme in Bridgend. The service is currently run by the Vale of Glamorgan Council through a Partnership Agreement. There are currently 16 individuals in long-term placements, and 13 Shared Lives households (either single or couple carers).</p> <p>In March 2025, Cabinet approved continuation of this partnership for a term of 5 years subject to annual review. The proposal is for all individuals and self-employed carers within the scheme to move into a banded payment system in order to make this a fairer system for all involved.</p> <p>Consultation will be undertaken to ensure the views of those affected can be considered. The consultation proposed will be run in conjunction with the Vale of Glamorgan Council as our operational partner.</p> <p>The Vale of Glamorgan Council is also seeking similar consultation.</p>

## 1. Purpose of Report

- 1.1 The purpose of this report is to seek Cabinet approval to commence consultation regarding the proposed changes to the Shared Lives Scheme.

## 2. Background

2.1 In March 2025, Cabinet approved the continuation of the Partnership Agreement with Vale of Glamorgan (VOG) Shared Lives (Adult Placement) Scheme, where there are currently 16 individuals in long-term placements, and 13 Shared Lives households (either single or couple carers).

2.2 All individuals using the scheme have been assessed by Adult Services and are then referred to Shared Lives as part of their care and support plan to meet eligible unmet needs and their contributions are determined by a financial assessment.

2.3 The proposal within the Partnership is for all individuals and self-employed carers supported by the scheme to move into a banding system in order to make this fairer for all involved. Should the move to banding be approved by Cabinet, two key factors will change from current practice in Bridgend:

- A) Banded allowance rates paid to self-employed Shared Lives carers;
- B) Alignment of personal contributions towards their accommodation made by individuals supported within the scheme.

### Current allowance rates to Shared Lives carers

2.4 Currently, Bridgend carers receive a fixed standard rate of £616.77 per week irrespective of the level of needs or complexity of the individual(s) they support. This can be viewed as inequitable as it does not recognise the differing levels of complexity of those cared for, and does not recognise the different levels of care provided by carers. As self-employed carers, this payment is made as an allowance where the carers themselves are responsible for managing their tax position. Some carers with lower caring responsibilities may have other paid work, whereas some carers rely solely on the Shared Lives Scheme for their income.

2.5 The intention of the proposed banding system is to create a more equitable approach across the partnership between Bridgend County Borough Council (BCBC) and the Vale of Glamorgan Council (VOG) through all individuals being placed in one of three bandings:

Band 3 – high levels of care/support	Paid £636.88 per week
Band 2 – mid-level care/support	Paid £609.60 per week
Band 1 – low levels of care/support	Paid £481.62 per week

These rates are for the 2025-26 financial year and will be subject to an annual uplift for 2026/27, which is yet to be confirmed.

2.6 This follows banding systems used in other Shared Lives partnerships across Wales and the UK. Notably, the proposed bandings for the Bridgend Scheme will utilise competitive allowance rates in comparison to neighboring schemes, where the proposed banding rates (allowances paid to carers) in the VOG/BCBC Partnership are higher, for example, than those paid by the South East Wales partnership (which is the largest equivalent scheme in Wales).

2.7 As part of the consultation, officers will undertake further conversations to fully understand the impact of the proposed banding system and support the identification of the options for implementation, subject to Cabinet approval. This is especially important given the intention for the Shared Lives scheme to grow and diversify. The identification of a 'No detriment' approach will be an option consulted upon, which is intended to mitigate the potential risks and financial impact, primarily from the weekly income reduction for carers supporting Band 1 placements.

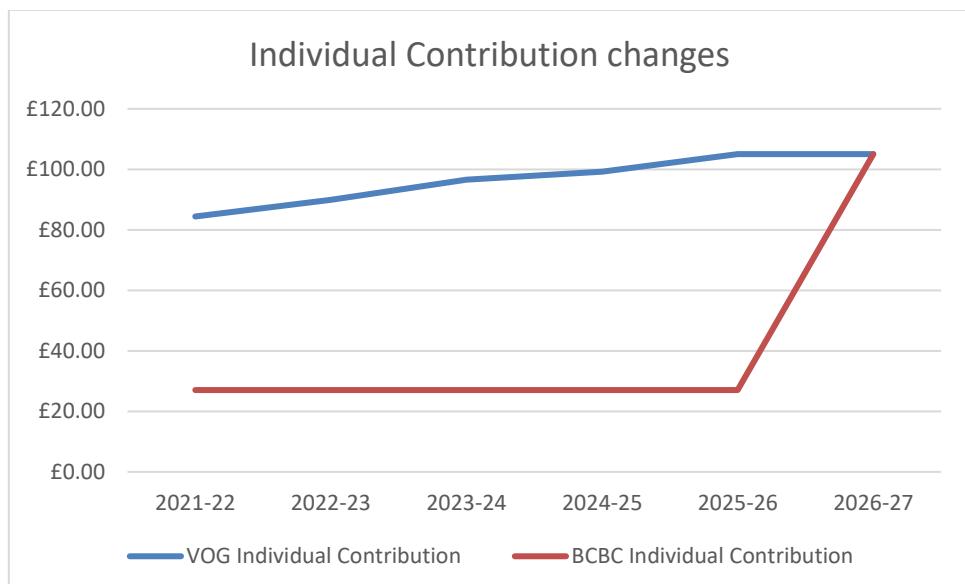
Personal contributions towards accommodation made by individuals receiving care and support within the scheme

2.8 While the Council funds the social care element of the service, individuals within the scheme pay towards their accommodation costs. This is made up of:

- rent (via Housing Benefit / Universal Credit) – which is set by local housing allowance rates
- personal contributions towards meals, heating and utilities – which form part of the allowance provided to the carers

2.9 Personal contributions are intended to supplement the rent as a payment towards the normal costs of living. The total of rent and personal contributions paid by individuals in Bridgend has been static at £105 per week since 2015.

2.10 The following graph shows personal contributions (excluding rent) in Bridgend and the Vale. As can be seen, BCBC individuals currently pay £27.05 per week, which has never been increased in line with inflation. This is in contrast to the VOG where annual increases in individual contributions have taken place, in line with annual inflationary uplifts, creating inequality within the Scheme. The position in Bridgend is a legacy rate implemented prior to the creation of the partnership in 2019. Because the Bridgend contribution has been static at this rate since at least 2015, and VOG individuals had already been subject to annual inflationary uplifts, this has created the difference between the starting rates shown in the graph below.



2.11 The move to banding is intended to bring about a unified and consistent approach to allowance payments for carers under the Shared Lives Scheme, which includes

an equitable approach to individual contributions. The table below provides a breakdown of the contributions:

<b>Band</b>	<b>Total Allowance</b>	<b>Total Individual Contribution (including rent which rates are remaining the same as currently)</b>	<b>BCBC Contribution</b>
1	£481.62	£197.08	£284.54
2	£609.60	£197.08	£412.52
3	£636.88	£197.08	£441.80

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

- 3.1 The consultation seeks to gain views and opinions around the proposal to implement the banding system and the impacts that this will have on the individuals, the carers and the service.
- 3.2 Of the three proposed bands, carers providing care and support to individuals in Band 3 will be positively impacted by this process, both financially and through the increased paid respite leave that is proposed, from 2 weeks (current allocation in Bridgend) to 4 weeks (in line with what VOG carers currently receive).
- 3.3 Although carers supporting individuals in Band 2 would currently receive £7.17 a week less (equates to an annual total of £372.84 loss per individual), the addition of another 2 weeks of paid leave per year (equating to £1219.20) results in them being positively impacted by a total of £846.36 for the year.
- 3.4 The option of a “no detriment approach” as outlined at paragraph 2.7, is focused on carers for individuals in Band 1, for whom there would be a proposed loss of £135.15 per week with allowances reducing from £616.77 (current BCBC fixed rate) to £481.62 (Band 1 rate) per week. The addition of 2 weeks paid leave would not be sufficient to offset the financial loss for these carers.
- 3.5 BCBC officers have discussed potential risks/impacts of implementing the banding system with the Shared Lives Team. This meeting indicated the potential likely responses and outcome of the proposed implementation of the bandings to support staff in shaping and identifying the requirements of the consultation.
- 3.6 As part of the consultation process, officers will welcome suggestions from carers to help identify how this transition to bandings can be most effectively implemented, should this be approved by Cabinet following consultation.
- 3.7 Officers have identified initial options, but in order for this to be a fair and effective consultation process, views from carers and Individuals will be sought to inform the full options. Options considered may include allowing for the temporary protection of the existing rates of allowances to ensure there is no loss of carer capacity. Where this is identified, the details around any temporary protections will be confirmed and presented as part of the final report to Cabinet.
- 3.8 As shown from the graph in section 2.10, individual contributions have not been increased annually in BCBC since 2015. The current personal contribution of £27.05 per week is not a realistic reflection of the true cost of living. This does not

help individuals to prepare for independence if/as and when they are ready to move on to more independent living arrangements.

- 3.9 By implementing the proposed approach and increasing the individual contribution in line with the VOG, this creates an equitable approach across the partnership, with realistic contributions towards weekly meals and utility costs. This will also prevent the likelihood of large build-ups of individual finances which can occur in their personal accounts, and which can sometimes jeopardise entitlement to Housing Benefit/Universal Credit. This aspect will be assisted by BCBC's Financial Safeguarding Team, where appointee/deputyship functions can also be provided as necessary.
- 3.10 Under the Charging and Financial Assessment Code of Practice (Part 4 & 5) issued under the Social Services and Wellbeing (Wales) Act 2014, where an authority amends existing policies, they are required to consult those affected locally. Whilst it is anticipated that there will be no fundamental amendments required to BCBC's Non Residential Charging Policy, assurance must be given that all individuals involved in the scheme, both carers and supported individuals, have had a full opportunity to consider their options and make a fully informed decision. Should any changes to the Policy be identified during the consultation period, these will be reported as part of the final Cabinet report to be presented later in the year.
- 3.11 VOG are pursuing a full consultation to be coordinated as a partnership, for the same reasons of equity and to ensure all voices are heard. While the main impacts identified in Bridgend are for long-term placements, the Shared Lives service is also a high-quality option for short-term/respite placements, and the consultation will help to clarify the payment arrangements and expansion opportunities for short-breaks and respite.
- 3.12 The consultation will be offered online as well as targeted in-person conversations with individuals and carers currently involved with the scheme. Given the currently low numbers of individuals and carers involved in the scheme for BCBC (there are 16 people in long-term placements, and 13 Shared Lives households), commitment is given that 100% of individuals and carers will be directly consulted, to ensure they understand the proposals, their options, and be given the opportunity to provide feedback.
- 3.13 As the commissioned provider of Specialist Advocacy for Learning Disabilities, People First Bridgend have also agreed to offer independent advocacy support for any individuals that may need this during these consultation discussions.
- 3.14 The responses and discussions that take place throughout the consultation will seek to ensure that all those involved with the scheme understand the options being presented, and have the opportunity to provide feedback and alternative suggestions to be considered. There will also be an opportunity to use the consultation process to raise awareness of the Shared Lives Scheme more widely, and be used to help in potential future carer recruitment.
- 3.15 The exact nature and timing of the consultation will be agreed between the partners and with key stakeholders, including BCBC Communications Teams. It is proposed that this consultation will run for 12 weeks with the findings presented back to Cabinet.

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

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

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

5.1

Involvement	In the formation of this report, relevant officers from the Directorate have been involved along with partners from the VOG. Through the consultation, individuals and carers involved with the scheme will have the opportunity to feed into the formulation of the future structure as set out by the proposal.
Long term	This report and proposal sets out to bring a consistent set of terms and conditions to the Shared Lives Scheme for carers and individuals supported which will enable a more consistent growth of the service to allow for more carers to support more individuals through the service.
Prevention	The aim of this proposal will be to prevent and remove inconsistent terms and conditions for individuals and carers involved with the scheme and also allow for individuals support to experience a more fair, equitable and realistic set of expectations towards their contributions to their living arrangements, which will set them up for success as and when they move on from the scheme.
Integration	This proposal will be integrated across the shared lives service ensuring equality of approach for all involved across the partnership.
Collaboration	Partnership working has taken place with our shared lives partners in the VOG to create this proposal.

#### **6. Climate Change and Nature Implications**

6.1 There are no climate change and nature implications as a result of this report or the proposals within it.

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

7.1 The use of the Shared Lives Scheme partnership supports the Council to fulfil its corporate safeguarding requirements by allowing for greater care to be provided to adults with additional needs. The proposal enables the council to extend these duties through the provision of a fairer, more equitable and realistic service.

7.2 There are no Corporate Parenting implications from this report or its associated proposals.

## **8. Financial Implications**

- 8.1 While cost saving is not the driver for the introduction of these bandings, the implementation of this system should bring about savings to the Directorate. This is mainly due to the rebalancing of individual contributions, which consequently reduces the placement costs to BCBC.
- 8.2 Any financial implications/savings linked to the final recommended proposal will be set out in the next report to Cabinet, following the consultation (if approved).

## **9. Recommendations**

It is recommended that Cabinet:

- 9.1 Approve the commencement of consultation for a period of 12 weeks regarding the proposed changes outlined in the report, noting that the process will be coordinated with the Vale of Glamorgan Council and other stakeholders from Spring 2026;
- 9.2 Note that a further report will be presented to Cabinet following the consultation.

## **Background documents**

None

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# Agenda Item 7

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>HOUSES IN MULTIPLE OCCUPATION - DRAFT SUPPLEMENTARY PLANNING GUIDANCE</b>
<b>Report Owner: Cabinet Member / Responsible Chief Officer</b>	<b>CABINET MEMBER FOR REGENERATION, ECONOMIC DEVELOPMENT AND HOUSING</b>  <b>CORPORATE DIRECTOR - COMMUNITIES</b>
<b>Responsible Officer:</b>	<b>JACK DANGERFIELD SENIOR STRATEGIC PLANNING POLICY OFFICER</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no impact on the policy framework or procedure rules.</b>
<b>Executive Summary:</b>	<b>The purpose of this report is to report back to Cabinet on the results of the 6-week public consultation on the Houses in Multiple Occupation draft Supplementary Planning Guidance (SPG), the comments and issues raised, the Local Planning Authority's response and how those comments have influenced the final version of the SPG. This report also seeks Cabinet approval to submit the final form SPG to Council for adoption. Subsequent adoption of this SPG will enable effective implementation of the policy on Houses in Multiple Occupation within the adopted Replacement Local Development Plan (RLDP), the Council's statutory land-use planning document.</b>

## 1. Purpose of this report

- 1.1 The purpose of this report is to report back to Cabinet the results of the 6-week public consultation on the Houses in Multiple Occupation (**HMO**) draft Supplementary Planning Guidance (**SPG**), the comments received and issues raised, the Local Planning Authority's (**LPA**) response, and how those comments have influenced the

final version of the SPG. It also seeks Cabinet approval to submit the final form SPG to Council for adoption (**Appendix 1**).

## 2. Background

2.1 The adopted Replacement Local Development Plan (“**RLDP**”, March 2024) plays a key role in enabling sustainable, mixed and balanced communities, including the development of HMOs. The Town and Country Planning (Use Classes) Order 1987 (as amended) (**Use Classes Order 1987**) distinguishes between two types of HMO:

- ‘**Small HMOs’ (Use Class C4)**: properties occupied by **3 to 6 unrelated people** sharing basic amenities; and
- ‘**Large HMOs’ (Unique Use or ‘*Sui Generis*’)**: properties with **more than 6 unrelated people** sharing basic amenities.

2.2 Prior to February 2016, planning permission was only required for large HMOs. Since that date, all HMOs require planning permission whether they accommodate 3-6 people (C4) or 7+ people (*Sui Generis*), as long as the occupants do not form a single household.

2.3 The definition of a ‘*Small HMO*’ under Use Class ‘C4’ aligns with the definition of an HMO in Section 254 of the Housing Act 2004 (**HA 2004**). Likewise, the definition of a single household in Use Class C3(a) (dwellinghouses) of the Use Classes Order 1987 aligns with Section 258 of the HA 2004, which explains when people are or are not considered to be part of the same household or family.

2.4 Section 258 also applies when determining whether a property meets the definition of an HMO under Section 254 – this includes both ‘*Small HMOs*’ (C4) and ‘*Large HMOs*’ (*Sui Generis*). These legislative changes have increased awareness of HMOs within the planning system.

2.5 HMOs can play an important role in the County Borough’s housing mix by providing a broader range of accommodation options, particularly for students, young professionals and those on lower incomes. However, they also raise specific planning challenges. HMOs are often characterised by shorter than average tenancies leading to higher population turnover, and their occupation by multiple independent adults can increase the intensity of residential use. This, in turn, can lead to increased activity in and around a property, more noise, greater demand for parking and additional pressures on waste management.

2.6 Whilst not every HMO will result in adverse impacts, and in some cases the level of activity may be comparable to that of a large family household, the cumulative effect of high concentrations of HMOs can be significant. These cumulative impacts can include harm to residential amenity, erosion of local character and loss of community cohesion. There is a need to strike a careful balance between supporting housing choice and preventing the over-concentration of HMOs in any given locality. RLDP Policy COM7 specifies criteria to assess the appropriateness of proposals to convert

dwellings into HMOs, aiming to avoid over-intensification of the use as an HMO within any given locality.

2.7 The draft SPG relating to HMOs (**Appendix 1**) aims to provide additional detail and guidance on how adopted Policy COM7 should be interpreted and applied in practice. It is intended to assist planning applicants, officers and Members by clarifying the requirements of Policy COM7 and how proposals will be assessed. The draft HMO SPG also explains the relationship between planning and other regulatory regimes relevant to HMOs, such as Licensing and Building Regulations, highlighting how these other statutory regimes operate alongside, but separately from, the planning system. In doing so, the draft SPG aims to ensure a consistent and transparent approach to managing HMO development, supporting the creation of sustainable, balanced communities throughout the County Borough. This draft HMO SPG provides specific guidance on:

- How HMOs are defined in planning terms and when planning permission is required for HMOs;
- The roles of Planning, Licensing and Building Regulations in respect of HMOs;
- Application of the radius test (ensuring that no more than 10% of properties are HMOs within a 50m radius in any given area);
- How the character and appearance of the locality is considered when major extensions or alterations are proposed;
- How the scale and intensity of HMOs will be considered in relation to HMO applications;
- How local parking provision will be considered in relation to HMO applications;
- Amenity considerations (for both future HMO occupants and neighbours); and
- Submission requirements for applicants.

2.8 At their meeting on 8th August 2024, the Development Control Committee requested development of a specific SPG on HMOs to provide additional planning guidance to support adopted Policy COM7. Councillor Simon Griffiths volunteered to champion the production of the HMO SPG on behalf of Development Control Committee and work alongside the Senior Strategic Planning Policy Officer to progress it.

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

3.1 On 23rd September 2025, Cabinet provided approval for a six-week public consultation on the draft SPG - Houses in Multiple Occupation to take place. The consultation was subsequently launched on 6th October 2025 and closed on 16th November 2025, and was promoted through a variety of channels to ensure wide engagement. The consultation was hosted on the Council's consultation portal, supported by a social media campaign and standalone message to Citizen Panel subscribers. It was also included twice in the Council's residents' bulletin and in the regular news bulletin for Councillors to maximise public awareness. In addition, targeted emails were issued to well over 100 stakeholders, including all elected

Members, town and community Councils, planning consultants/agents, neighbouring local authorities, estate agents, landlord representative groups, local community/non-profit groups, local further education (**FE**) providers and Registered Social Landlords (**RSLs**). This ensured that a broad range of community and development sector representatives were directly invited to comment, providing a robust and inclusive approach to the public consultation. The social media campaign, in particular, generated meaningful engagement, with several comments received in response to consultation posts. This indicates that the consultation was effectively publicised and prompted discussion.

3.2 A total of four representations were received on the draft SPG - Houses in Multiple Occupation during the consultation period. This low number reflects the fact that there were no fundamental objections to the draft SPG. All representations, together with the Local Planning Authority's response to each one, and the reasoning for not incorporating some suggestions, are set out in the 'Consultation Report' attached as **Appendix 2** to this Cabinet report. The comments submitted related to relatively minor points, resulting in three changes being made to the draft SPG document:

1. Insert a bullet point under paragraph 5.5 clarifying that hotel premises used for temporary accommodation are generally not considered as HMOs, unless in specific circumstances. This paragraph sits underneath a sub-heading titled '*Exclusions*', and specifically sets out which types of residential arrangements that are not typically considered HMOs for planning purposes. Such proposals will not be considered against Policy COM7. The inserted wording (amendment) will read as follows:

*'Hotel premises used for short-term temporary accommodation – A hotel building used to provide temporary accommodation for non-holiday residents, such as homeless households, which does not operate as a hotel in the conventional sense, is typically regarded as a 'sui generis' use.'*

2. Alter the wording of the fourth sentence of paragraph 5.6, an insertion to require the consultation of Shared Regulatory Services (who manage HMO Licensing) on all HMO planning applications. This will now read as follows (newly inserted words are shown in bold):

*'However, Shared Regulatory Services (SRS), who oversee the licensing and management of HMOs in Bridgend County Borough, **should will** be consulted on **all** planning applications for HMOs to ensure alignment between planning and housing enforcement considerations.'*

3. Insert a new headed section under the heading, 'Policy COM7: Criterion 6' of the SPG, titled '*HMOs and Security*' after paragraph 6.46, as paragraph 6.47, to read as follows:

*HMOs and Security*

*Applicants are encouraged to design HMOs in accordance with Secured by Design (SBD) principles and are advised to aim to achieve the SBD 'Gold' award (an award that acknowledges crime and anti-social behaviour reduction measures relating to layout, environmental design and the use of Police Preferred Specification products), where practicable.'*

3.3 Furthermore, some of the comments received in response to the public consultation indicated the need for clearer guidance on the differences between each of the three regulatory regimes relating to the management of HMOs: Planning, Licensing and Building Regulations. Each of these regimes play a distinct role in the management of HMOs' potential impacts, so it is important to be aware of the issues that each regime covers. Therefore, a two-page guidance note '*A Guide to HMO Planning, Licensing and Building Regulations*' has been produced to accompany the SPG. This is attached at **Appendix 3** to this report.

3.4 There were no other changes considered necessary to the draft SPG following the public consultation. Once adopted, the SPG will add weight to the interpretation and application of RLDP Policy COM7, provide more detailed advice and guidance to planning applicants, and will become a '*material consideration*' in the determination of planning applications.

#### **4. Equality implications (including socio-economic duty and Welsh language)**

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

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

5.1 The Houses in Multiple Occupation SPG, once adopted, will provide additional guidance and material weight to support adopted RLDP Policy COM7. The HMO SPG aims to enable the development of HMOs while safeguarding residential amenity, community cohesion and the character of existing neighbourhoods. This is a key contributory factor to delivering Local Well-being Objective One - '*A prosperous place with thriving communities*'.

5.2 The HMO SPG, once adopted, will also contribute to the following goals within the Well-being of Future Generations (Wales) Act 2015:

- *A Wales of cohesive communities* - Seeks to prevent the over-concentration of HMOs and promote balanced communities.
- *A more equal Wales* - Supports access to affordable and flexible accommodation for individuals and enables housing options that meet diverse needs.

## **6. Climate change and nature implications**

6.1 There are no direct climate change or nature implications from this report, although the HMO SPG, once adopted, will provide additional guidance to enable the development of sustainable HMOs that promote active travel opportunities.

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

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

## **8. Financial implications**

8.1 There are no financial implications arising from this report.

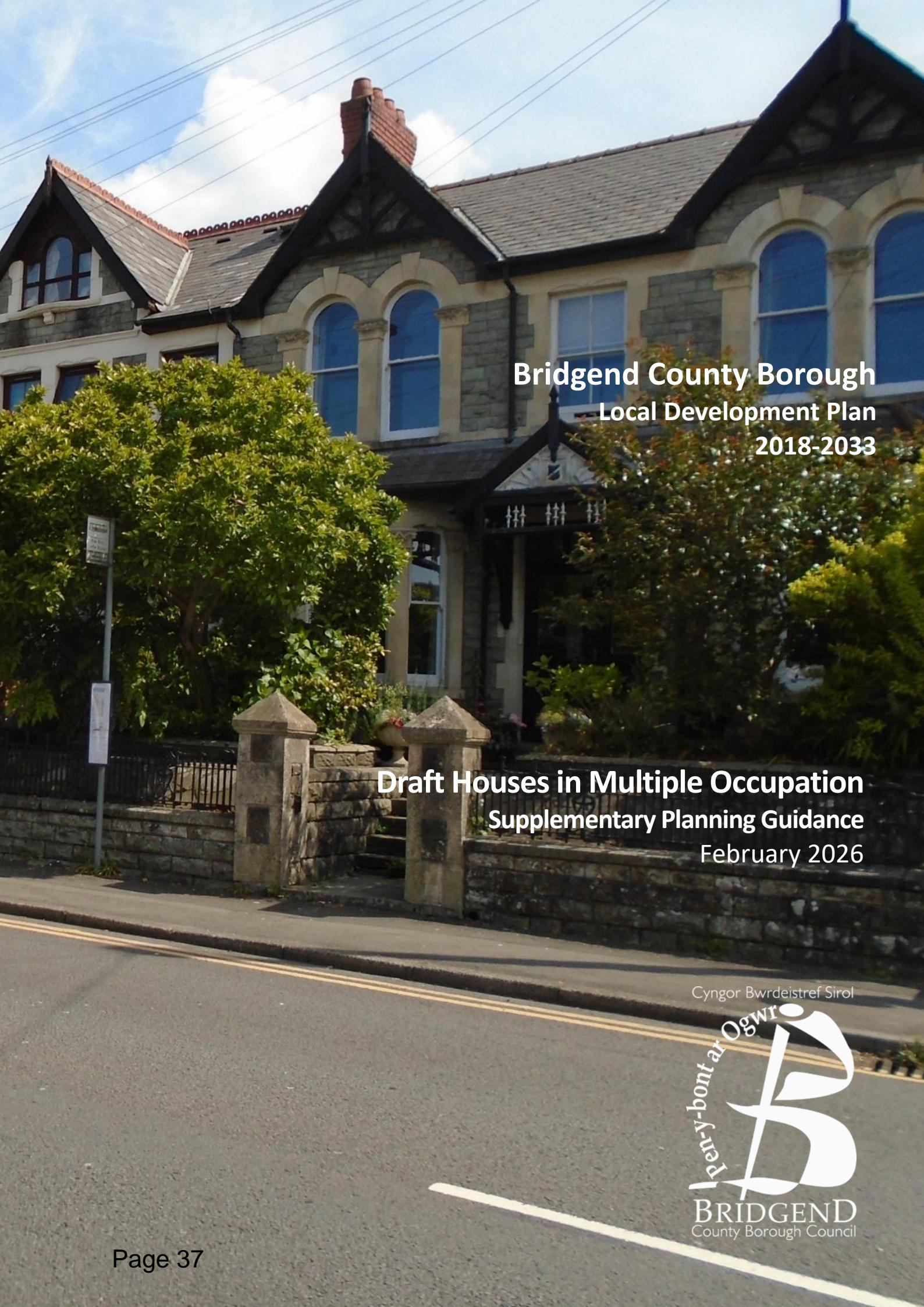
## **9. Recommendations**

9.1 It is recommended that Cabinet:

- (a) Note the contents of this report and the consultation responses received on the Houses in Multiple Occupation draft SPG, together with the resultant proposed amendments attached as **Appendix 2**.
- (b) Note and approve the contents of the two-page guidance note titled '*A Guide to HMO Planning, Licensing and Building Regulations*' attached as **Appendix 3**.
- (c) Approve presenting the final form Houses in Multiple Occupation draft SPG (**Appendix 1**) to Council to seek its adoption.

## **Background documents**

None.



**Bridgend County Borough  
Local Development Plan  
2018-2033**

**Draft Houses in Multiple Occupation  
Supplementary Planning Guidance  
February 2026**

Cyngor Bwrdeistref Sirol



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Chapel Street, Bridgend

## 1.0 Introduction

- 1.1 Houses in Multiple Occupation (HMOs) are generally defined as properties occupied by three or more unrelated individuals, forming more than two households (Welsh Government, Law Wales: Houses in Multiple Occupation). The Local Planning Authority (LPA) recognises the important role HMOs play in contributing to Bridgend County Borough's housing supply by providing flexible and often more affordable accommodation options for a diverse range of residents.
- 1.2 HMOs can indeed provide accommodation for small households who may otherwise be unable to meet their needs in the market and/or require flexibility to move home. They are typically occupied by students, young professionals and those on short-term work contracts.
- 1.3 However, residents of HMOs can often remain in situ for relatively less time than residents of other dwelling houses, meaning areas with significant concentrations of HMOs can witness greater population turnover. Equally, multiple occupation of a house can involve intensification of its residential use, due to a greater number of independent adults residing within the property. In certain instances, this can lead to increased levels of activity in and around the house, greater noise levels, additional demand for car parking spaces and waste disposal issues. Nevertheless, conversion of a single dwelling house into an HMO may not necessarily constitute intensification. For example, a single dwelling house could accommodate an adult couple plus several additional adult children who are set to remain in the parental home for an unspecified period. On this basis, it is normally difficult to demonstrate the degree of impact that an individual property converted to an HMO may have on the character and amenity of its surroundings. However, a high proportion of HMOs can have a much more significant cumulative impact on the character of an area, its residential amenity and also local community cohesion.

1.4 Common perceptions associated with HMOs include:

- Negative changes to the character of an area
- Negative impacts on the amenity of occupants and neighbours through the intensification of uses
- Increased pressure on parking provision
- Waste storage and litter issues
- Anti-social behaviour/crime issues
- The provision of inadequate living conditions for occupiers
- Negative impacts on the physical environment and streetscape.

1.5 While not all of these issues (should they arise) are under the direct control of the LPA, the adopted Replacement Local Development Plan (RLDP) includes Policy *COM7: Houses in Multiple Occupation*. This aims to ensure that proposals to convert dwellings into HMOs are assessed as to their appropriateness in order to avoid over intensification of the use within the locality. This Supplementary Planning Guidance (SPG) provides planning applicants and officials with additional information on how to interpret and apply Policy COM7. This SPG will be taken into account as a material planning consideration when determining planning applications for HMOs.



## 2.0 National Policy Context

- 2.1 **Future Wales: The National Plan 2040** – While HMOs are not explicitly referenced within *Future Wales*, it includes high-level planning goals that support their management through local policy, especially in terms of creating sustainable, well-connected, and balanced communities. It includes several *Placemaking Principles* which promote high-quality, inclusive, and sustainable places. LPAs are expected to support mixed and balanced communities, which aligns with the goal of managing concentrations of HMOs to avoid harmful social and/or environmental impacts.
- 2.2 *Policy 2 – Shaping Urban Growth and Regeneration* of Future Wales encourages urban intensification in a way that supports well-being and community cohesion. HMOs, which can increase intensification in urban areas, must be managed carefully to align with this policy.
- 2.3 *Policy 7 – Delivering Affordable Homes* of Future Wales supports diverse housing provision, particularly for those on lower incomes. While privately run HMOs are not classed as 'Affordable Housing' for the purposes of the land use planning system, HMOs can provide an affordable market housing option for those otherwise unable to meet their needs in the housing market.
- 2.4 *Policy 9 – Resilient Ecological Networks and Green Infrastructure* indirectly supports the management of the intensification of HMOs, as they can lead to an increase in population densities which can place more pressure on services and green spaces. By managing their distribution, LPAs can support the resilience of ecological networks.
- 2.5 **Planning Policy Wales (PPW) (Edition 12)** sets out the overarching national planning policy for Wales and should be used to guide planning and placemaking at the local level. These policies underpin local planning policies used to guide development.
- 2.6 PPW emphasises the need to promote sustainable development and support the well-being of people and communities across Wales, such as by ensuring that a range of housing types are delivered to support a diverse population

and a range of housing needs. PPW also promotes the creation of cohesive and balanced communities.

2.7 While HMOs are not specifically referred to within PPW, it underscores the need for LPAs to ensure that housing developments contribute to balanced communities and meet the diverse needs of the population. This includes providing a range of housing types and tenures to accommodate different household sizes and compositions.

### 3.0 Background

3.1 The preparation of this SPG is driven by several interrelated factors. These include the projected rise in single-person households and persistent housing affordability issues, both of which are increasing demand for shared housing across many parts of the UK. While Planning, Licensing and Building Regulations each serve distinct legal purposes, they all contribute to the regulation of HMOs and work best when aligned. Applicants often face challenges in navigating the interplay between these regimes. This SPG aims to provide local interpretation, clarification, and practical guidance on the implementation of HMO-related planning policy – specifically Policy COM7 of the RLDP. It is intended to support both applicants and planning officers in applying this policy consistently and transparently, while reinforcing the LPA's wider housing and placemaking objectives.

3.2 Although the number of planning applications for HMOs in Bridgend County Borough has remained relatively low over the past five years – averaging approximately 5 per year – the issue has gained greater prominence following legislative change in February 2016. The Town and Country Planning (Use Classes) (Amendment) (Wales) Order 2016 (“**Wales Order 2016**”) created a new C4 Class covering HMOs occupied by 3-6 unrelated persons. Therefore, the Town and Country Planning (Use Classes) Order 1987 (as amended) (**Use Classes Order 1987**) now contains a clearer distinction between small HMOs (Use Class C4) and large HMOs (Unique Use), with implications for when planning permission is required. Prior to February 2016, planning permission was only required for large HMOs. However, since this date planning permission is required for all HMOs whether housing 3-6 or 7 or more unrelated persons. As a result, and in anticipation of potential future growth in HMOs, it is considered timely and appropriate to provide SPG to guide decision-making. This guidance will ensure that any new HMO development supports well-balanced, inclusive communities, avoids harmful over-concentrations, and contributes positively to the County Borough's long-term placemaking aspirations.

## 4.0 Planning Framework

4.1 The RLDP sets the framework to provide an appropriate and sustainable supply of housing land to deliver inter-connected, balanced communities that form the basis for individuals and families to prosper in all aspects of their lives. The strategic planning framework is set out within Strategic Policy 6: Sustainable Housing Strategy (SP6), which is supported by Development Management Policies COM1 – COM7:

### **SP6: Sustainable Housing Strategy**

- COM1: Housing Allocations
- COM2: Affordable Housing
- COM3: On-Site Provision of Affordable Housing
- COM4: Off-Site Provision of Affordable Housing
- COM5: Affordable Housing Exception Sites
- COM6: Residential Density
- COM7: Houses in Multiple Occupation

4.2 Policy COM7 provides specific policy criteria to assess HMO proposals throughout Bridgend County Borough. It considers whether the cumulative concentration, scale and intensity of such proposals may have a net impact upon the broader locality's existing residential amenity, character and appearance. The aim of the policy is to enable HMOs to be developed in a manner that enables cohesive communities, while protecting local character and amenity.

4.3 This SPG will be used as a material consideration to support the application of Policy COM7. It will assist in the determination of any planning application for the conversion of a single dwelling (Use Class C3) or a non-residential property to an HMO, or the intensification of use of a 'C4' property (small HMO with 3-6 unrelated residents) to a 'Unique Use' (more than 6 unrelated persons sharing basic amenities) large HMO.

## 5.0 HMO Definitions and Regulatory Context

5.1 This section provides an overview of how HMOs are defined and regulated, setting out the distinctions between planning definitions, licensing requirements, and building regulations, while clarifying how these different regimes interact.

### HMOs in Planning Terms

5.2 HMOs can be defined as residential dwellings with three or more people from two or more different families living together (i.e. not a '*single household*') and sharing one or more basic amenity (i.e. kitchen, bathroom, or toilet). The Town and Country Planning (Use Classes) Order 1987 (as amended by the Wales Order 2016) classifies HMOs into two types:

- **A small HMO:** Use Class C4 – small HMOs are shared houses or flats occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities, such as a kitchen or bathroom; or
- **A large HMO:** 'Unique Use' – large HMOs are buildings occupied by more than six unrelated individuals, as their only or main residence, who share basic amenities, such as a kitchen or bathroom. These are unclassified by the Use Classes Order and are therefore considered to be a Unique Use (a use of its own kind or '*sui generis*').

5.3 For planning purposes of determining whether occupants of a property form a '*single household*' or an '*HMO*', the relevant meanings in the Use Classes Order 1987 and the Housing Act 2004 (**HA 2004**), apply. The meaning of '*small HMO*' under Class C4 as a 'house in multiple occupation' (but not a converted block of flats), in the Use Classes Order 1987 (as amended), aligns with and refers to the meaning of "*HMO*" in section 254 of the HA 2004. The meaning of '*single household*' under Class C3 of the Use Classes Order 1987 (as amended) aligns with section 258 of the HA 2004 which sets out when persons are to be regarded as not forming a single household for the purposes of s254 HA 2004 ('house in multiple occupation'), and when a

person is considered to be a member of the '*same family*', or fall within a description specified by regulations made by the appropriate national authority. For these purposes, section 258 (3) HA 2004 provides that a person is a member of the '*same family*' as another person if:

- a. those persons are married to, or civil partners of, each other or live together as if they were a married couple or civil partners;
- b. one of them is a relative of the other; or
- c. one of them is, or is a relative of, one member of a couple and the other is a relative of the other member of the couple.

5.4 As mentioned above (paragraph 3.2), Use Class C4 was introduced in Wales in 2016. A change of use from Use Class C4 to Class C3 (dwellinghouses) is permissible without obtaining planning permission. However, planning permission is required in each of the following scenarios:

- A change of use of any building (including from Use Class C3) to either a small (Use Class C4) or large (Unique Use) HMO.
- An increase in the size of an HMO from a small HMO (C4) to a large HMO (Unique Use). For example, if a small HMO containing 6 people was to increase in size for the occupation of one additional resident. The same applies in reverse - the change of use of a large HMO (Unique Use) to either a small HMO (C4) or a dwelling (C3) will require planning permission.
- External alterations or extensions to existing HMOs which are not permitted development.

#### Exclusions

5.5 While the definition of an HMO generally relates to properties occupied by three or more unrelated individuals sharing basic amenities, there are several types of residential arrangements that are typically not considered HMOs for planning purposes. These include:

- Owner-occupied properties with up to two lodgers – Where a resident landlord lives in the property and rents out rooms to no more than two lodgers, this is usually considered a single household and not an HMO.
- Children's homes or supported accommodation for children – Properties where children live under care arrangements (often registered children's homes), which fall under Use Class C2.
- Residential care homes or supported housing for people in need of care – Also within Use Class C2, these include homes for elderly people, disabled people, or others receiving care.
- Purpose-built student accommodation (PBSA) – Self-contained developments designed specifically for students are not usually classed as HMOs.
- Hotel premises used for short-term temporary accommodation – A hotel building used to provide temporary accommodation for non-holiday residents, such as homeless households, which does not operate as a hotel in the conventional sense, is typically regarded as a 'sui generis' use.
- Properties occupied by a single household – A group of people who live together as a single household (e.g. A family) are not considered to live in an HMO.

### **Mandatory Licensing for HMOs**

5.6 The planning system is one of several regulatory regimes applying to HMOs. Properties may also require a mandatory licence under the Housing Act 2004 and need to comply with building regulations. These regimes are separate, with distinct criteria – approval under one does not imply approval under another. However, Shared Regulatory Services (SRS), who oversee the licensing and management of HMOs in Bridgend County Borough, will be consulted on all planning applications for HMOs to ensure alignment between planning and housing enforcement considerations.

5.7 The Housing Act 2004 mandates licensing for certain types of HMO to ensure they meet certain health and safety standards. In Wales, mandatory licensing applies to HMOs that:

- Are occupied by five or more individuals forming two or more households;
- Comprise three or more storeys; and
- Share basic amenities like kitchens or bathrooms.

5.8 Licences usually last five years, though shorter terms may be issued if concerns exist about management. Licensing ensures the property meets standards for safety (e.g. fire precautions), has appropriate occupancy levels, and is adequately managed. Conditions may be attached to reduce negative impacts on the wider area. Beyond mandatory licensing, there is no additional or selective licensing in place for HMOs across Bridgend Country Borough.

5.9 A two-and-a-half storey property with a dormer extension would typically be regarded as a three-storey building for the purposes of mandatory HMO licensing.

#### Fit and Proper Persons Test

5.10 Licence holders and managers must be deemed 'fit and proper persons', with no relevant convictions (e.g. fraud, violence, sexual offences, housing law breaches), and must demonstrate competency to manage an HMO.

#### Management Regulations

5.11 Managers must comply with the Management of Houses in Multiple Occupation (Wales) Regulations 2006, and, where applicable, the 2007 Additional Provisions Regulations. These impose duties including:

- Providing information to occupiers;
- Taking fire and general safety measures;
- Maintaining water, gas, electricity supplies;
- Keeping common parts, fittings, and appliances in good order;
- Maintaining living accommodation; and
- Providing proper waste disposal.

5.12 Failure to comply is a criminal offence, with fines of up to £20,000 on conviction.



Pant Hirwaun, Heol y Cyw

### Inspections and Health & Safety

5.13 Before issuing a licence, SRS inspect the property to assess licence conditions and housing standards under the Housing Health and Safety Rating System (HHSRS). This assesses 29 hazards, each weighted to determine whether a property has:

- **Category 1** (serious hazards); or
- **Category 2** (less serious hazards).

5.14 Local authorities must act where Category 1 hazards are found, and landlords are required to address all identified risks.

### Operating Without a Licence

5.15 Running a **licensable HMO** without a licence is a criminal offence, as is failing to comply with licence conditions, both subject to significant penalties. The application process is managed by SRS (for further information refer to the [Licensing of HMOs Guidance Note](#)).

## Homelessness (Suitability of Accommodation) (Wales) Order 2015

5.16 Shared accommodation provided to homeless households in priority need must meet the standards set out in the Homelessness (Suitability of Accommodation) (Wales) Order 2015. Under Article 2 of the Order, where the accommodation is an HMO, it must be licensed where required and meet relevant HMO standards. This ensures that individuals are not placed in unsuitable or substandard housing.

## Building Regulations

5.17 An existing house converted to an HMO can still be a 'dwellinghouse' and would not require separate Building Regulations approval if it is to be occupied by people who share a tenancy, share the bills and where the property does not have any locks on the bedroom doors.

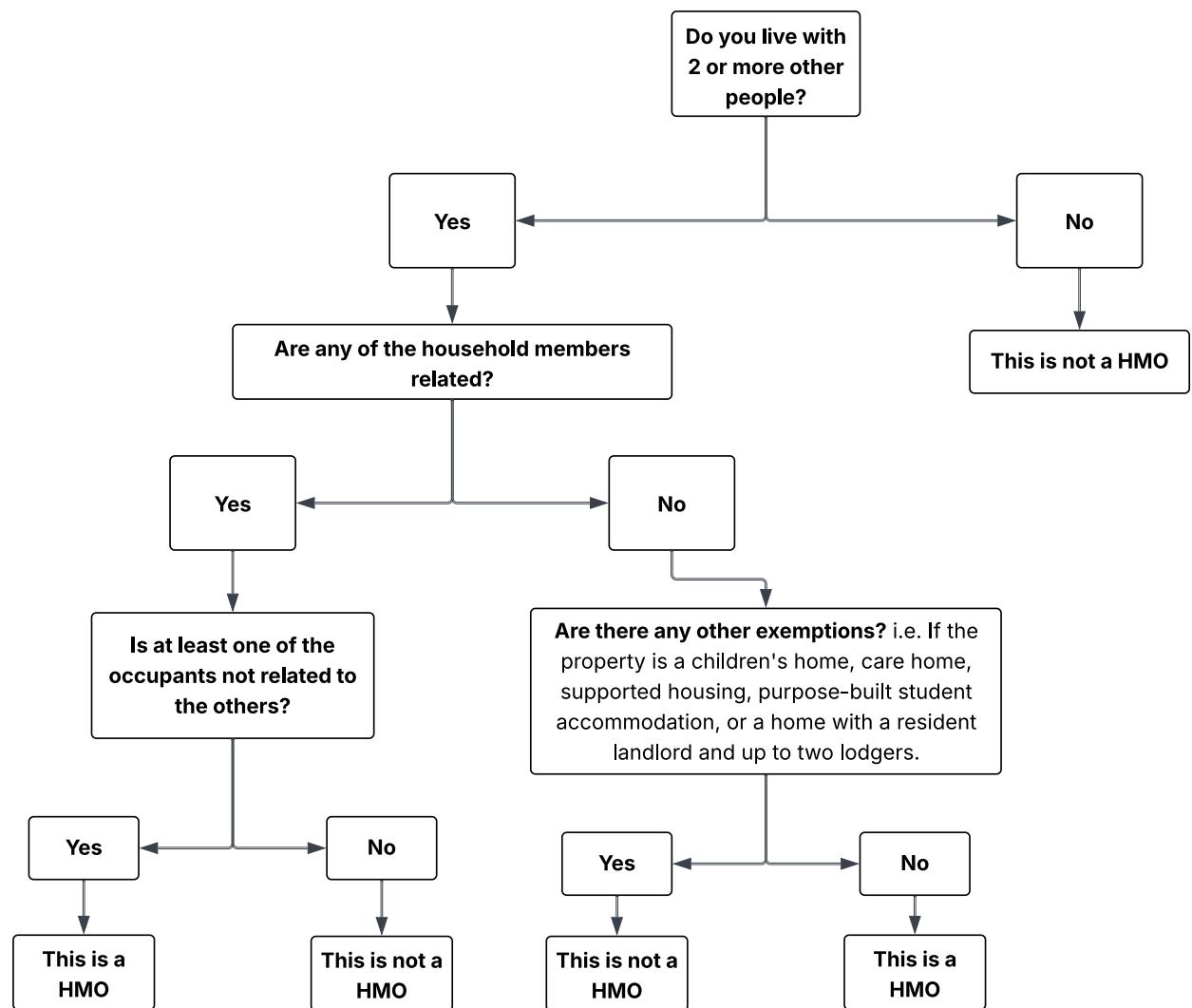
5.18 However, where the HMO is occupied by people with separate tenancies and proposes to have locks on doors, this would then be classed as 'rooms for residential purposes'. This would constitute a material change and require building regulations approval.

5.19 Any other type of change of use to an HMO would require a Full Plans Building Regulation application, and be expected to install the following before occupation:

- Emergency lighting
- Fire safety signage
- Fire doors throughout (self-closing where applicable)
- Fire detection throughout building
- Protected corridor to final exit.

5.20 A statutory consultation with South Wales Fire Service will also be required. The application process is managed by Building Control (for further information see the [Building Control section of the Council's website](#)).

**Figure 1: Do I Live in an HMO?**



## 6.0 Planning Requirements

6.1 This section provides further guidance on each of the criteria set out in Policy COM7 of the RLDP. It is intended to support applicants and decision-makers by clarifying how the policy should be interpreted in the context of proposals for HMOs, and by outlining key considerations to be addressed through the planning process. A list of documents the LPA would typically expect to be submitted when making a planning application for an HMO can be found in Appendix A.

### Policy COM7: Criterion 1

*'It would not lead to more than 10% of all residential properties within a 50m radius of the proposal being HMOs.'*

6.2 All proposals for a change of use from a single dwelling to an HMO will be subject to the 'radius test'. The Welsh Government's Housing in Multiple Occupation: Review & Evidence Gathering report found that local concerns regarding the number of HMOs increases once concentrations of HMO households rise above 10%. Such concentrations have the potential to cause negative amenity impacts upon existing residents including the potential for increased levels of disturbance associated with multiple households within a property. These factors combined with a reduction in the number of family homes within an area can inhibit the maintenance of sustainable, mixed and balanced communities.

6.3 Any proposal that would lead to more than 10% of all residential dwellings being HMOs within a 50m radius would be contrary to Policy COM7 and deemed unacceptable, unless overriding material considerations demonstrably outweigh concerns over concentration.

6.4 To ascertain whether a proposal complies with this policy criterion, a circle with a 50m radius should be drawn around the central point within the property's red line boundary to show all properties falling within this area. Only those properties whose centre point (that is the most central point within a property's red line boundary) falls within the circle should be included within

the calculation. A calculation of the proportion of HMOs as a percentage of all residential units within the 50-metre radius should then be made as detailed in paragraph 6.2.5. For subdivided properties or purpose-built apartment blocks, each individual self-contained unit (whether resulting from a subdivision or located within an apartment block) will be counted as a single dwelling.

- 6.5 In order to identify existing properties in HMO use, the LPA will utilise data held on the number of existing HMOs within the proposal's vicinity. This will include any previous planning consents combined with any current HMO licenses. The applicant or any objectors may supplement or challenge such data held by the LPA. However, satisfactory evidence must be provided to support any such claims.
- 6.6 To calculate the percentage of HMOs within a specific area, the following formula should be used:

**HMO concentration = Number of HMOs within 50m radius**

**X 100**

**Number of residential properties  
within 50m radius**

**The answer to this equation should be rounded to the closest integer i.e. 9.5% should be rounded up to 10%, or 9.4% should be rounded down to 9%.**

- 6.7 To determine the appropriate denominator, all residential dwellings that fall within a 50m radius that are categorised as either Use Class C3 (dwellinghouse), C4 (small HMO) or 'Unique Use' (large HMO), must be included within the calculation. Figure 2 shows an example of how the radius test should be applied to an application for an HMO to ascertain whether it complies with Policy COM7.

**Figure 2: Application of 50m Radius Test**



## Policy COM7: Criterion 2

*'Conversion is possible without major extensions or alterations to the building which would significantly alter the character and appearance of the street scene and the broader locality.'*

- 6.8 It is recognised that the majority of conversions to HMOs will require minimal alterations to their external appearance. However, any alterations should be well integrated with the existing street patterns, historic context, urban layout and landscape features of the surrounding area, while having regard to the size and character of the property and wider street scene.
- 6.9 Extensions to an HMO to create additional bedrooms would not constitute creation of a new HMO or add to the concentration of HMOs in a locality. However, any increase in the number of residents can have an impact on the character of an area and amenity of neighbouring occupiers. These types of planning applications will be assessed on a case-by-case basis. In such cases, careful consideration will be given to the proposal's impact upon the locality's amenity, character and appearance. Impact on adjoining properties and public spaces, such as by way of loss of light, privacy or proposals being visually overbearing, will be duly considered. Proposals should also consider how the building interacts with pavements or other public spaces.
- 6.10 If floor levels are altered, the impact on the appearance of the property from street level should be considered. When larger rooms are split into two separate rooms, the applicant should ensure that any new windows align with the divided room. A new dividing wall that intersects the middle of a traditional bay window will not usually be acceptable.
- 6.11 The entrance and approach to an HMO is an important part of how it functions in relation to its surroundings. When HMOs are accessed from side or rear entrances, this can cause amenity issues for neighbouring residents, as well as have an impact on the visual appearance of the street scene. Entrances designed to be visible from the street are considered optimal.

6.12 The provision of on-site car parking or secure cycle storage, where required to support an HMO conversion, will not generally be considered to constitute a major extension or alteration to the building. Such works are typically modest in scale and, where appropriately designed, do not significantly alter the character or appearance of the street scene or wider locality. Each case will be assessed on its individual merits, but this SPG assumes that proposals of this nature can ordinarily be accommodated within the scope of the policy criterion.

#### Permitted Development Rights (PDRs) and HMOs

6.13 Once planning permission has been granted for a property to operate as a HMO, some PDRs may still apply, depending on the type of HMO. In Wales, small HMOs (Use Class C4) are generally treated as “dwellinghouses” for the purposes of the Town and Country Planning (General Permitted Development) Order 1995 (as amended) (GPDO). This means that most householder PDRs, such as certain extensions, loft conversions, and outbuildings, can still apply, subject to the usual limitations and conditions.

6.14 However, larger HMOs (Unique Use) and are not considered dwellinghouses under the GPDO. As a result, PDRs that apply to dwellinghouses do not usually extend to large (Unique Use) HMOs.

6.15 When granting planning permission, the LPA may apply a planning condition that requires the HMO to be limited to a maximum number of occupants at any one time. This will typically relate to the number of bedrooms in accordance with the internal layout indicated on the approved floor plans. A further planning condition may be applied to remove the owner’s PDR for an HMO on a case-by-case basis.

#### Converting Non-Residential Buildings to HMOs

6.16 Proposals to convert non-residential buildings to HMOs that include extensions and/or external alterations will be considered on their own merits against the policies in the RLDP. Such proposals should, however, be in

keeping with the existing form and character of the building and preserve the character of the wider street scene.

#### HMOs, Listed Buildings and Conservation Areas

6.17 Owners of listed buildings converted to HMOs are required to gain listed building consent for any alterations or extensions (internal or external) that may affect its character. The LPA recommends that applicants seek guidance from the Historic Buildings Conservation Officer before submitting an application for such a scheme. The LPA, when considering whether to grant planning permission for development that affects a listed building, has a statutory duty to “have special regard to the desirability of preserving the building or its setting or any features of architectural or historic interest that the building possesses” (Section 66 of the Planning (Listed Buildings and Conservation Areas) Act 1990). PPW (Edition 12, p.130) sets a ‘general presumption in favour of the preservation or enhancement of a listed building and its setting, which might extend beyond its curtilage’.

6.18 Proposals for HMOs located within or affecting the setting of conservation areas should demonstrate how they will preserve or enhance the special character and appearance of the area. As conservation areas are designated for their special architectural or historic interest, development proposals must be informed by a heritage impact assessment in accordance with Policy *SP18: Conservation of the Historic Environment* of the RLDP. Any physical alterations, intensification of use, or changes to the character of a property arising from HMO conversion should be sensitive to the historic and architectural context. The LPA will resist proposals that fail to respect the distinctive character, appearance, and setting of the conservation area, in line with national best practice and relevant legislation, including the Historic Environment (Wales) Act 2016.

6.19 Careful consideration should be given to retrofitting insulation and installing solar photovoltaics in/on HMO buildings in addressing energy consumption. Traditional buildings require the ability for moisture evaporation off surfaces and insulation can be damaging to the building fabric. Advice from the

Council's Conservation and Design Team can highlight practices that avoid harmful installations and that damage architectural character.

6.20 The LPA recommends obtaining pre-application conservation advice for proposals relating to Listed Buildings / buildings in Conservation Areas as well as key historic buildings that form part of the historic landscape. These may include former chapels / welfare halls / vacant traditional buildings, etc. Guidance on managing change and energy efficiency measures relating to the historic environment is also available and should be used to inform proposals relating to buildings of traditional construction. When preparing proposals, developers are encouraged to seek advice from a heritage specialist with experience of working on historic buildings.

#### **Policy COM7: Criterion 3**

*'The scale and intensity of use would be compatible with the existing building and adjoining and nearby uses'.*

6.21 While it is important to manage the number of HMOs within a particular area, intensification of individual HMOs can adversely impact the existing building and adjoining and nearby uses. Planning permission will need to be sought to increase the size of an HMO from between three to six people (Use Class C4) to seven or more people (Unique Use). All planning applications for HMOs must not only be assessed against Policy COM7 and this SPG, but also against *Policy SP3: Good Design and Sustainable Placemaking*. Policy SP3 sets out broader requirements relating to design quality and the character of development in relation to its surroundings.

#### Intensification of Use and Impact on a Neighbourhood's Character

6.22 Proposals for new, or the intensification of existing HMOs, should have regard to the size and character of the property, as well as of the wider street scene (opposite and adjacent uses, in particular). Each proposal will be assessed on a case-by-case basis, but the net gain in the number of occupants should not be unduly excessive in nature.

6.23 The proposal's impact on the amenity of local residents, the character and appearance of the street scene, and highway safety will be assessed at the

point of application. To enable the LPA to fully assess the HMO's compatibility with the existing building and neighbouring uses, the applicant is required to submit floor plans which provide a clear indication of the proposed room uses, including bedrooms, communal spaces and location of any opening windows. Plans for bedrooms must also indicate the maximum number of occupants. Potential impacts on residential amenity will be assessed by considering elements such as visual impact, loss of light, overlooking, privacy, disturbance and likely traffic movements.

6.24 When assessing planning applications for changes of use to HMOs, it is important to distinguish between perceived impacts based on the previous occupants and the lawful planning use of the property. The planning system does not control who occupies a dwelling, but rather how it is used. For example, a property lawfully used as a single dwellinghouse (Use Class C3) may be occupied by a couple or by a large family of adults without requiring planning permission. As such, assessments of impact must be based on the potential lawful use under current planning controls, not the specific nature of past occupants. Proposals for HMOs should therefore be judged against a baseline of the established planning use and whether the proposal would result in a material change in the character or impact of the use in planning terms, rather than who previously lived at the property.

### Compatibility of Uses

6.25 HMOs must be compatible with nearby uses. For example, an HMO would not be deemed acceptable if located in the middle of an industrial estate, as this would be contrary to other policies in the RLDP. In particular, applications for the conversion of commercial buildings to HMOs should consider the nature of adjacent and nearby uses and the degree to which they are compatible with a residential property. For example, a proposal for a new HMO adjoining a commercial premises should be able to provide outdoor amenity space without adversely impacting upon the servicing and security of the neighbouring business.

6.26 Typically, planning permission is not required for internal alterations to an HMO, unless the building is listed, the alterations significantly impact the building's external appearance or involve structural changes affecting fire safety, escape routes, or load-bearing walls. Proposals to convert communal areas (i.e. a sitting room into an additional bedroom) may require planning permission if they result in a material change of use. This could be due to the resulting change in character, impact on residential amenity, increase in the number of occupiers, and/or parking pressures.

#### HMOs in Flood Risk Areas

6.27 In areas at risk of flooding, the potential intensification of residential use associated with HMO development may exacerbate local flood risk or pose risks to future occupants. Proposals for HMOs in flood risk areas should demonstrate that flood risk is adequately addressed in accordance with national guidance (e.g. Technical Advice Note 15). Applicants may be required to submit a Flood Consequences Assessment. The LPA may resist intensification of use through HMO development where it would lead to unacceptable environmental pressures.

#### Policy COM7: Criterion 4

*'The proposal incorporates on-site parking provision or demonstrates that it will not have an adverse effect on local parking provision'.*

6.28 Parking is a frequently raised concern in relation to HMOs. However, the nature of car ownership and demand for parking spaces can vary depending on location, resident profile, and site-specific factors. Importantly, the conversion of a property to an HMO does not automatically result in increased parking demand; in many cases, HMOs can have lower levels of car ownership than traditional family homes.

6.29 All applications for HMO proposals must include details of the proposed parking provision. The appropriate level of provision will be assessed by the LPA based on the following considerations:

- The availability and suitability of parking within the curtilage of the property;
- The sustainability of the site in relation to proximity to services and amenities;
- Access to public transport, bus stops and active travel routes (e.g. walking and cycling infrastructure);
- The availability of existing on-street parking in the surrounding locality; and
- A comparison of the likely parking demand of the proposed HMO with that of the existing use.

6.30 Proposals in localities with good access to commercial centres, public transport and active travel routes could negate the need for any additional parking generated by a net increase in people.

#### Methodology for Assessing Parking Impact

6.31 Applicants are required to assess the potential impact on local parking provision using the methodology set out in Appendix C. This methodology enables a proportionate, consistent approach to assessing whether additional parking demand would result in adverse impacts on the surrounding area. A

summary checklist is also included in Appendix C to guide applicants through the assessment process.

### Design Requirements for On-Site Parking

6.32 Where on-site parking is proposed, the following principles apply:

- Provision within the curtilage of the property is preferred, where feasible.
- Parking layouts should:
  - Complement the residential character of the area; and
  - Avoid dominating the frontage or detracting from the building's entrance and approach.
- Tandem parking is not acceptable for HMOs.
- Each parking space should be independently accessible – vehicles should be able to enter and leave each space without needing to move others.
- Parking provision should comply with the latest Bridgend Parking Standards SPG.
- As Policy *PLA11: Parking Standards* of the RLDP states, consideration must be given to electric and Ultra Low Emission Vehicles.
- Schemes that provide on-site parking by sacrificing amenity space are unlikely to be acceptable.
- Where front gardens are converted into parking, paving materials used should be permeable or porous.

6.33 It is noted that off-street parking for existing dwellings may relieve existing on street parking pressures and better enable residents to charge an electric vehicle.



Newcastle Hill, Bridgend

## Policy COM7: Criterion 5

*'The proposal includes adequate storage for recycling/refuse, cycles and a clothes drying area'*

### Bicycle Storage

6.34 HMOs should provide secure, covered and accessible bicycle storage within the curtilage of the property and on the ground floor. As a general rule, a minimum of one bicycle parking space per bedroom will be required, reflecting the likelihood that each occupant is an independent adult with their own transport needs. This standard supports active travel, aligns with the Active Travel (Wales) Act 2013, and can help reduce pressure on car parking provision. The LPA may consider a reduced standard in exceptional circumstances. These include where it can be robustly demonstrated that demand will be lower, or where storage can be provided outside the curtilage of, yet in close proximity to the property. However, lack of bicycle storage may result in refusal of planning permission due to amenity, accessibility or sustainability concerns.

6.35 Plans submitted with the planning application should clearly identify where proposed bicycle storage is located. Corridors and landings should not be used for storing bicycles and storage areas will need to be sensitively designed to ensure their regular use does not have an adverse impact on the amenity of residents.

6.36 The LPA may use planning conditions to ensure the provision of secure cycle storage for residents of HMOs.

### Refuse and Recycling Storage

6.37 All proposals will be required to incorporate adequate provision for the secure storage of refuse and recycling materials. This should be separate to any amenity space or clothes drying areas provided for residents, and away from view from street level, wherever possible. The location, design and size of external bin storage areas should be suitable for such as use and should not detract from the character of the locality. Where possible, bins should be

stored to the side or rear of the property. Unimpeded access should be provided to these facilities in a manner that enables occupants to freely move refuse and recycling to the front of the property ready for collection. If the only option is to store refuse and recycling at the front of the property, suitable screening should be provided. All waste and recycling storage areas should be clearly identified on plans submitted with the planning application.

6.38 Provision for waste facilities in new build HMOs must comply with Policy ENT15: Waste Movement in New Development in the RLDP.

#### Clothes Drying Area

6.39 A dedicated external area (containing either a rotary or washing line) for clothes drying is recommended in order to reduce the risk of damp and mould forming indoors. Where only internal drying provision is possible, the space provided should be well and securely ventilated, adequately sized for the number of occupants and separate from communal living areas, such as kitchens, bathrooms, or sitting rooms. It should be capable of being heated and enclosed (e.g. with a closable internal door) to prevent condensation spreading to other parts of the property. The clothes drying area must be clearly defined on the submitted plans. Consideration should be given to providing a dryer/washer-dryer for tenants to use.



Amenity space with rotary washing line, Pencoed



Covered bin storage unit, Bridgend

#### Policy COM7: Criterion 6

*'The proposed development would not have an unacceptable adverse impact on residential amenity.'*

6.40 In assessing whether a proposed HMO would have an unacceptable adverse impact on residential amenity, consideration should be given to the potential effects on both the occupants of the HMO and neighbouring properties.

Residential amenity includes factors such as:

- Noise and disturbance;
- Privacy;
- Access to natural light and outlook; and
- Adequacy of internal and external amenity space.

6.41 In the context of HMOs, where accommodation is often intensified and shared, it is particularly important to take a wider view of residential amenity that includes the health, safety and well-being of occupants. RLDP Policies *SP3: Good Design and Sustainable Placemaking* and *SP8: Health and Well-*

*being* set out key criteria for ensuring that development supports people's health and well-being.

6.42 Internal floor dimensions of living spaces are considered an important element of maintaining appropriate amenity standards and providing for healthy and attractive environments. This applies to both new buildings and conversions. For example, the conversion of existing buildings to HMOs should not result in over-intensive residential use that would give rise to cramped living conditions and/or rooms with insufficient windows. To ensure proposals do not have an unacceptable adverse impact on residential amenity, applicants should seek to ensure appropriate room sizes, and the SRS licensing standards attached at Appendix B can be used as a guide in these respects.

6.43 SRS also require a readily accessible bathroom/shower room be not more than one floor away from each bedroom, and that the number provided supports the number of occupants. Minimum standards are also provided for Water Closets (WCs). The LPA regards these standards as best practice and therefore applicants are encouraged to apply the same standards for all HMOs, regardless of size. Refer to Appendix B.

#### Outdoor Amenity Space

6.44 HMOs should provide outdoor amenity space in which residents can relax. Amenity spaces provided should be an appropriate size for the number of occupants and accessible to all residents at all times. They should be separate to space used for activities such as clothes drying and storing refuse/recycling and bicycles. The retention of existing gardens is recommended to support biodiversity, for amenity value and to help reduce surface water flooding.

#### Protecting the Amenity of Neighbouring Uses

6.45 In line with Policy SP3 of the RLDP, HMOs must be designed to avoid unacceptable adverse impacts on the amenity of neighbouring occupiers. Proposals should prevent overlooking, overshadowing, and the creation of adverse microclimatic conditions through careful site layout and design.

### HMOs Above/Adjoining Commercial Premises

6.46 If a proposal for an HMO adjoins a commercial premises, amenity space should be provided to minimise disturbance due to noise. HMOs above shops or other commercial premises should have their own separate entrance to the street frontage.

### HMOs and Security

6.47 Applicants are encouraged to design HMOs in accordance with Secured by Design (SBD) principles and are advised to aim to achieve the SBD 'Gold' award (an award that acknowledges crime and anti-social behaviour reduction measures relating to layout, environmental design and the use of Police Preferred Specification products), where practicable.

### Material Considerations

6.48 Planning decisions must be based on land use impacts and material planning considerations, not the identity or personal characteristics of future occupants. It is not appropriate, or lawful, to refuse planning permission for an HMO on the basis of assumptions about who may live there, including concerns about perceived behaviour, lifestyle, or potential for criminal activity. For example, it would not be acceptable to oppose an HMO application on the grounds that:

- The property may be occupied by students, young people, or the unemployed, and that this could lead to anti-social behaviour;
- There is a belief that future residents may not 'fit in' with the surrounding community; or
- There are generalised fears that HMOs lead to crime without evidence of a land-use impact.

## Appendix A – Submission Requirements for Applicants

- Application form
- Site location plan
- Block plan of the site
- Existing and proposed floor plan, including internal floor areas for each room
  - floor plans should clearly identify proposed room uses, including bedrooms, communal spaces and the location of any opening windows. It should be indicated what each room will be used for and how many people in each room. For bedrooms, the plans must also indicate the maximum number of occupants. Also, the location of bedrooms in relation to communal areas must be clear.
- Details of waste and recycling
- Details of bicycle parking
- Details of external amenity space
- Details of drying space
- Elevation plans where any extensions or new openings such as windows and doors are proposed
- Supporting statement including details of proposed parking provision (car and bicycle)
- Any supporting evidence; for example, parking surveys, information about local parking provision, etc.

## Appendix B – HMO Licensing Standards

While these standards are not planning standards and cannot be imposed or enforced as such, the LPA recommends use of these licensing standards as a 'best practice' guide to ensure appropriate room sizes and amenity standards in HMOs.

### **Part One: HMO Space Standards**

#### Space Requirements for Shared Accommodation with Shared Facilities

*(includes the kitchen, lounge, bathroom, and toilet)*

**Table 1: Bedroom Space Standards**

Room	Size	Configuration	Space Requirements
Bedroom(s)	Single	With separate lounge	6.5m <sup>2</sup>
		Without separate lounge	10m <sup>2</sup>
	Double	With separate lounge	10m <sup>2</sup>
		Without separate lounge	15m <sup>2</sup>

**Table 2: Kitchen Space Standards**

Room	Number of Occupants	Space Requirements
Kitchen	1-2 person/s	5.5m <sup>2</sup>
	3-6 persons	7m <sup>2</sup>
	7-10 persons	10.5m <sup>2</sup>

#### Space Requirements for Self-Contained Accommodation

*(exclusive use of own facilities)*

**Table 3: Self-Contained Accommodation Space Standards**

Accommodation Type	Number of Rooms	Configuration	Space Requirements
Single Bedsit/Flat	One room	Lounge/Kitchen/Bedroom	13m <sup>2</sup>
Double Bedsit/Flat			15m <sup>2</sup>
Single Bedsit/Flat	Two rooms	Lounge/Kitchen	10m <sup>2</sup>
		With separate bedroom	6.5m <sup>2</sup>
Double Bedsit/Flat		Lounge/Kitchen	13m <sup>2</sup>
		With separate bedroom	11m <sup>2</sup>
Single Bedsit/Flat	Two rooms	Lounge/Bedroom	10m <sup>2</sup>
		With separate kitchen	5.5m <sup>2</sup>
Double Bedsit/Flat		Lounge/Bedroom	15m <sup>2</sup>
		With separate kitchen	5.5m <sup>2</sup>

## **Part Two: HMO Amenity Standards**

### Bathroom and Toilet Amenities within Shared Accommodation

**Table 4: Bathroom/WC Facility Standards**

*Toilets (WCs):	Number of Occupants	Quantity	Configuration
	Up to 4 occupants	1 WC	May be in bathroom/shower room
	5 occupants	1 WC	In a separate compartment
	6 occupants	2 WC	May be in bathroom/shower room
	Between 7-10 occupants	2 WC	1 WC to be in a separate compartment to the room containing bath/shower
	Between 11 – 15 occupants	3 WC	1 WC to be in a separate compartment to the rooms containing baths/showers

\*Each WC to include a wash hand basin with an adequate supply of cold water and constant hot water.

**Table 5: Bathroom Requirements**

	Number of occupants	Quantity
*Bathroom:	Every 5 occupants	1 bathroom

\* Each bathroom to contain a bath or shower with an adequate supply of cold water and constant hot water, but not necessarily a toilet or wash hand basin.

Toilets and bathrooms to be provided in an enclosed and adequately laid out and ventilated room, either:

- Within the living accommodation; or
- Within reasonable proximity to the living accommodation.

#### Bathroom and Toilet Amenities within Self-Contained Accommodation

Where bathroom facilities are for the exclusive use of an individual household, i.e. in self-contained flats or individual bedsits, they are to include:

- A toilet
- A bath or shower with an adequate supply of cold and constant hot water.
- A wash hand basin.

Toilets and bathrooms to be provided in an enclosed and adequately laid out and ventilated room, either:

- Within the living accommodation; or
- Within reasonable proximity to the living accommodation.

#### Kitchen Amenities within Shared Accommodation

It is recommended that at least 2 double electrical sockets are provided in addition to the cooker socket.

**Table 6: Kitchen Amenities Requirements**

Amenity	Number of Occupants	Configuration
Cooker	Up to 5 occupants	1 full cooker - (1 oven and 4 hobs)
	Up to 7 occupants	1 full cooker – (1 oven and 4 hobs) <u>AND</u> at least one alternative cooking option (e.g. air fryer/microwave, etc.)
Sink	Up to 5 occupants	1 sink - (With hot and cold water and draining board)
	Up to 7 occupants	1 sink – (With hot and cold water and a draining board) <u>AND</u> a dishwasher.
Work Surface	Up to 5 occupants	2.0 linear metres  Note – (a work surface of at least 500m must be sited adjacent to each cooker).
	Each occupant thereafter	An additional 0.5 linear metres per occupant
Dry Goods Storage	Per occupant	1 base unit (500mm) OR 1 wall unit (1,000mm)  Note – (space under sink unit & drainer not

		allowable for food storage).
Refrigerated Storage	Per occupant	1 shelf in a refrigerator <u>AND</u> 1 shelf in a freezer, per person.

### Kitchen Amenities within Self-Contained Accommodation

Where kitchen facilities are for the exclusive use of an individual household. i.e. in a self-contained flat, or individual bedsit, the following is to be provided:

- A cooker of adequate size to include 2 – 4 ring hobs with oven or a microwave.
- A sink unit (with drainer) with adequate supply of cold and constant hot water.
- A work top for food preparation, of minimum size 1m x 0.6m
- A work surface of at least 500mm must be sited adjacent to each cooker.
- A standard under-counter size fridge as a minimum AND a freezer to be provided (*in addition to the fridge*) OR one standard fridge/freezer would meet this requirement.
- A cupboard for food and utensil storage, of minimum size 500mm standard base OR wall unit (1,000mm).
- Sufficient electrical sockets. It is recommended that at least 2 double sockets are provided in addition to the cooker socket.

## Appendix C – Methodology for Assessing Parking Impact

The following methodology should be used to assess whether a proposal will have an effect on parking provision.

### Step 1: Site Accessibility and Context

Applicants must provide an assessment of the site's accessibility, including:

- Distance to bus stops, railway stations and frequency of services;
- Quality and connectivity of walking and cycling routes;
- Access to local amenities (i.e. shops, schools, employment hubs, etc.); and
- Presence of car clubs or shared mobility options.

This will provide context for car dependency and potential vehicle ownership for both the existing and proposed use.

### Step 2: Calculate Parking Demand – Existing Use

Calculate the likely parking demand of the existing use by considering:

- Household size and composition;
- Local car ownership data (e.g. latest census or local surveys);
- The number of bedrooms and available off-street parking.

### Step 3: Calculate Parking Demand – Proposed HMO

Calculate parking demand generated by the proposed HMO, taking into account:

- Expected number of residents and their typical car ownership profile;
- Accessibility data from Step 1; and
- Comparable data from existing HMOs in similar locations.

### Step 4: Net Impact Assessment

Compare the calculated parking demand of the existing and proposed use:

- If there is no net increase in likely vehicle demand, the proposal is unlikely to have an adverse impact.

- If there is a net increase, further evidence is required to demonstrate this can be accommodated (proceed to step 5).

### **Step 5: Assess Local Capacity and Parking Stress**

If additional demand for parking is expected, the applicant must demonstrate that the local area can accommodate the net increase. This may involve:

- Providing evidence of available off-street parking provision; and
- Undertaking a parking survey of the surrounding streets to assess existing parking stress and capacity. In all cases, the survey should:
  - Follow a methodology agreed with the Highways Authority (e.g. Overnight surveys);
  - Include weekday and weekend data;
  - Cover a reasonable radius (typically 100-200m walking distance); and
  - Present clear data on the number and occupancy of on-street spaces.

**Table 7: Parking Capacity vs Demand Checklist**

Step	Requirement	What to Submit
<b>1. Site Accessibility and Context</b>	Demonstrate the site's accessibility by sustainable travel modes and proximity to services.	<p>Map or written statement showing:-</p> <ul style="list-style-type: none"> <li>• Distance to bus stops and frequency of services</li> <li>• Proximity to railway stations</li> <li>• Walking and cycling routes</li> <li>• Nearby services and amenities</li> <li>• Any car clubs or shared mobility schemes.</li> </ul>
<b>2. Parking Demand – Existing Use</b>	Calculate typical car ownership for current (C3) use.	<ul style="list-style-type: none"> <li>• Description of current/former use – including plans</li> <li>• Household size or composition</li> <li>• Estimated car ownership level (with data source)</li> <li>• Existing off-street parking availability.</li> </ul>
<b>3. Parking Demand – Proposed HMO</b>	Calculate parking demand for the proposed HMO.	<ul style="list-style-type: none"> <li>• Expected number of occupants – including proposed plans</li> <li>• Car ownership assumptions based on</li> </ul>

		<p>local evidence or comparable HMOs</p> <ul style="list-style-type: none"> <li>• Reference to accessibility factors from Step 1.</li> </ul>
<b>4. Net Impact Assessment</b>	Compare existing and proposed parking demand.	<ul style="list-style-type: none"> <li>• Table or written summary comparing both scenarios</li> <li>• Clear statement on whether there is a net increase in demand.</li> </ul>
<b>5. Local Parking Capacity / Parking Survey</b>	If net demand increases, assess whether this can be accommodated.	<ul style="list-style-type: none"> <li>• Details of any proposed on-site parking provision</li> <li>• If relying on on-street parking: a parking *survey following an agreed methodology</li> </ul> <p>* Survey must include:-</p> <ul style="list-style-type: none"> <li>○ Map of surveyed area (100m-200m radius) which includes any traffic restrictions</li> <li>○ Weekday and weekend overnight occupancy</li> <li>○ Number and type of available spaces</li> <li>○ Summary of capacity vs demand.</li> </ul>



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## Appendix 2: Consultation Representations, Responses and Resultant Actions

<p><b>Do you have any comments on the proposed additional guidance for criterion 1 of adopted Policy COM7, which requires HMO proposals to ‘not lead to more than 10% of all residential properties within a 50m radius of the proposal being HMOs’?</b></p>	
<b>Organisation</b>	Bridgend County Borough Council (Elected Member)
<b>Representation</b>	This might be further qualified by also taking into account the proximity of non-HMO residential properties such as Purpose Built Student Accommodation (PBSAs). There might also be a case for including hotel premises used for the provision of temporary housing.
<b>Local Planning Authority response</b>	<p>The SPG has been prepared to provide additional guidance on the application of adopted Replacement Local Development Plan (RLDP) policies. It does not introduce new policy and cannot depart from, override, or amend the policies of the RLDP. As criterion 1 of Policy COM7 states that proposals for HMOs should <i>‘not lead to more than 10% of all residential properties within a 50m radius of the proposal being HMOs’</i>, the SPG is limited to the consideration of properties that fall under the definition of an HMO in planning terms.</p> <p>PBSAs generally fall under the ‘Sui Generis’ use class, not use class C4 (HMOs), as stated under paragraph 5.5 of the SPG. Hotel premises used for the provision of temporary housing does not automatically become an HMO in planning terms unless its use fundamentally shifts to long-term residential occupation. The Welsh Government’s ‘Houses in Multiple Occupation: Practice Guidance’ (March, 2017) states that, <i>‘to fall within the ‘house in multiple occupation’ definition a property must be occupied as the main residence’</i>. If the occupancy is short-term, it is considered under the ‘Sui Generis’ use class. However, if the hotel becomes used predominantly as long-term shared living accommodation for unrelated adults, where the residents:</p> <ul style="list-style-type: none"> <li>• Live there as their main residence</li> <li>• Share cooking or washing facilities</li> </ul>

	<ul style="list-style-type: none"> <li>• And live broadly like an HMO...</li> </ul> <p>...then the use could be considered to have changed to an HMO and a planning application would be required. If such a change of use occurs, it will be considered against criterion 1 for each new HMO planning application within a 50m radius thereafter.</p>
<b>Resultant action</b>	Add a sentence stating under paragraph 5.5 clarifying that hotel premises used for temporary accommodation are generally not considered as HMOs. This will help to clarify when a building of this kind should be considered against criterion 1 of Policy COM7.
<b>Do you have any other comments to make on the proposed Houses in Multiple Occupation SPG?</b>	
<b>Organisation</b>	Bridgend County Borough Council (Elected Member)
<b>Representation</b>	<p>The reference to space standards in Appendix B is welcomed, so to align planning and housing enforcement considerations.</p> <p>I suggest that the term “should” on Page 13 5.6 be substituted with “will” so to read as follows:-</p> <p><i>However, Shared Regulatory Services (SRS), who oversee the licensing and management HMOs in Bridgend County Borough, should <b>will</b> be consulted on planning applications for HMOs to ensure alignment between planning and housing enforcement considerations.</i></p> <p>This is to ensure that SRS is consulted on each occasion.</p> <p>Further guidance might be required to deal with situations where an objection is received from SRS on the grounds of insufficient room sizes.</p>
<b>Local Planning Authority response</b>	The respondent's support for the SPG's reference to space standards in Appendix B is noted. Their suggestion to alter the wording in paragraph 5.6 is agreeable as this would help to strengthen the alignment between licensing standards and planning requirements, as suggested. It should be

	<p>noted, however that the SPG is not able to enforce licensing standards for planning proposals for HMOs.</p> <p>Regarding the point made about guidance for SRS objections on the grounds of insufficient room sizes, the RLDP does not contain an adopted policy on minimum room sizes for HMOs and it is beyond the scope of an SPG to specify new policy requirements in this manner. However, any objections raised by SRS in relation to specific planning applications would be considered accordingly through the development management process.</p>
<b>Resultant action</b>	<p>Alter the wording in paragraph 5.6 so it reads: '<i>However, Shared Regulatory Services (SRS), who oversee the licensing and management of HMOs in Bridgend County Borough, <b>should will</b> be consulted on <b>all</b> planning applications for HMOs to ensure alignment between planning and housing enforcement considerations</i>'.</p>
<b>General comments</b>	
<b>Organisation</b>	South Wales Police
<b>Representation</b>	<p>Secured by Design (SBD) is the official police security initiative to encourage the adoption of crime prevention methods and standards in new and existing housing. It aims to achieve a good standard of security for both the home and the surrounding environment:</p> <p>Welsh Government have been supportive of Designing out Crime and Secured by Design as shown by the following statements in documents:</p> <p><b>Welsh Government's Technical Advice Note (TAN)12.</b></p> <p>Paragraph 5.17.3 of TAN 12 states "The Safer Places and Secured by Design Initiative provide recognised standards, that have been shown to reduce crime (particularly residential burglary) and the impact of crime upon neighbourhoods. It is desirable for the security of all housing</p>

developments, public buildings, and all buildings funded by public bodies, to achieve similar measurable standards.”

### **Planning Policy Wales (PPW) 2024:**

PPW Wales states under 3.11 “Local authorities are under a legal obligation to consider the need to prevent and reduce crime and disorder in all decisions that they take. Crime prevention and fear of crime are social considerations to which regard should be given in the preparation of development plans and taking planning decisions. The aim should be to produce safe environments that do not compromise on design quality in accordance with the cohesive communities well-being goal.”

As can be seen from the above Welsh Government have addressed community safety and crime prevention in guides and legislation, and been supportive of Secured by Design.

UK Government Policy places a duty on local authorities through Section 17 of the Crime and Disorder Act:

### **Section 17 of the Crime and Disorder Act.**

Section 17 of the Crime and Disorder Act requires local authorities to consider crime and disorder implications in all their authorities and functions and do all that they reasonably can do all they can do to reduce these problems.

In respect of social housing in Wales, Welsh Government recognises the importance of having homes that are safe and secure for our communities, homes that house some of our most vulnerable people in society and are supportive and realise the value of Secured by Design. This is shown by Welsh Government requirements in the following:

**Welsh Development Quality Requirements (DQR) 2021 Creating Beautiful Homes and Places**

In the DQR all Welsh Government grant funded social housing in Wales must meet the Secured by Design Gold Standard to meet the Development Quality Requirements (DQR) set out in Beautiful Homes and Spaces.

### **Welsh Housing Quality Standards (WHQS) 2023.**

The Welsh Housing Quality Standards aim to improve the quality of social housing in Wales, ensuring that all social homes meet specific criteria for safety, comfort and environmental sustainability. The following security standards are specified in WHQS:

“External doors and windows must provide a reasonable level of physical security. A home has a ‘reasonable level of security’ if it is capable of complying with ‘Secured by Design’ (SBD), although it may not necessarily have an SBD certificate.

When fitting new external doors and windows: the replacements must comply with the product specifications for external doors and windows stated within the most recent edition of ‘Secured by Design’ and be independently certified as such.

When retaining existing doors or windows: delivering a reasonable level of security can be achieved by modification of existing installations to comply with SBD. Components, hardware and glazing used in modifications must comply with the product and material specifications stated within the most recent edition of ‘Secured by Design’ and be independently certified as such.”

Houses in multiple occupation provide accommodation for some of the most vulnerable people in society. Quite often HMO's house people who are not known to each other in shared accommodation. Women and girls also live in HMO's and violence against women and girls is high on the agenda of everyone.

### **Violence Against Women and Girls (VAWG).**

The harm caused to victims and society by violence against women and girls (VAWG) in all its forms, including but not limited to, harassment, stalking, rape, sexual assault, murder, honour-based abuse and coercive control is incalculable. While men and boys also suffer from many of these forms of abuse, they disproportionately affect women.

In spring 2023, the Home Secretary announced Violence Against Women and Girls as a national threat and included it within the 9 Strategic Policing Requirement (SPR) alongside terrorism, serious and organised crime and child sexual abuse.

Secured by Design can assist with ensuring that the built environment in all its forms, is designed to reduce the opportunity of Violence Against Women and Girls (VAWG) and contribute to such places feeling safe, to live.

In the consultation document security is not mentioned. Therefore I would ask that there be a heading in the SPG called Security of HMO's. Under this heading I would ask that the SPG states the following:

HMO's that are new builds, must meet the standards specified in the Welsh Government's Welsh Development Quality Requirements (DQR) 2021 Creating Beautiful Homes and Places and must meet Secured by Design Gold standard.

In respect of existing properties that are converted to HMO's I would ask that they meet the security standards specified in WHQS.

In addition security standards for bedroom doors are not specified in the Secured by Design Residential Guide. Therefore I would ask that in addition to the advice given in the SBD Guide, the

	<p>SPG states that in houses of multiple occupancy, bedroom doors should meet Secured by Design standards i.e. PAS 24 2022 or equivalent.</p> <p>Further information in respect of Secured by Design can be found on the website <a href="http://www.securedbydesign.com">www.securedbydesign.com</a>.</p>
<b>Local Planning Authority response</b>	<p>The LPA agrees that ensuring the security of HMOs and the people living within them and nearby is of the utmost importance. The respondent's suggestion to include a separate heading within the SPG titled 'HMOs and Security' is therefore accepted.</p> <p>However, it should be noted that Planning Policy Wales only refers to the application of the WDQR standards to affordable housing (as defined by Technical Advice Note (TAN) 2). They are not applicable to private new build HMOs and therefore it is beyond the scope of an SPG to necessitate this standard to be applied to all HMOs. Similarly, the Welsh Housing Quality Standards are national minimum standards for social housing owned or managed by local authorities and Registered Social Landlords (RSLs). It would be beyond the scope of this SPG to require application of these standards to all HMOs, including those privately owned and managed.</p> <p>The specification of internal security features, including Secured by Design standards for individual bedroom doors, is a matter for HMO licensing and building regulations rather than planning*. These detailed measures fall outside the scope of planning control and therefore cannot be referred to in the SPG.</p> <p>The SPG is able to <i>encourage</i> applicants to design proposals to that of Secured by Design 'Gold' standard. However, it cannot require them to adopt such standards as these are not specified in either local or national planning policy.</p>

<b>Resultant action</b>	<p>Insert a new headed section under the heading, 'Policy COM7: Criterion 6' of the SPG, titled 'HMOs and Security':</p> <p><b><u>HMOs and Security</u></b></p> <p><i>Applicants are encouraged to design HMOs in accordance with Secured by Design (SBD) principles and are advised to aim to achieve the SBD 'Gold' award (an award that acknowledges crime and anti-social behaviour reduction measures relating to layout, environmental design and the use of Police Preferred Specification products), where practicable.</i></p> <p><b><u>Guidance note</u></b></p> <p>*For clarity, we have produced a 2-page document titled 'A Simple Guide to Planning, Licensing and Building Regulations for Houses in Multiple Occupation', which is attached as an additional Appendix (<b>Appendix 3</b>) alongside this report. Its purpose is to clearly and simply set out what each regulatory regime – Planning, Licensing and Building Regulations – can achieve in relation to the management of HMOs.</p>
<b>Member of the public</b>	No. 01
<b>Representation</b>	<p>Is this hmo for Bridgend homeless, if it for the permanent holiday makers. How dare you put these men in our community. House prices will drop, crime, rape thefts. They looking for one of these men after an incident in Maesteg. How about protecting the people who live here &amp; pay taxes so they can stay I and have everything free. We are in a cost of living crisis and homeless. I am appalled that you want to turn us into a third word. You should go around bridgend and ask the people who live if they approve for hmo for local homeless or for immigrants. I say no and so would all of Maesteg and Bridgend. We did not invite them we don't want them send them back to France it safe there.</p>
<b>Local Planning Authority response</b>	<p>The draft HMO SPG provides additional planning guidance for HMO planning applications, but does not propose any specific HMOs across the County Borough. The occupation of HMOs is beyond the scope of the land use planning system.</p>

<b>Resultant action</b>	None required.
<b>Member of the public</b>	No. 02
<b>Representation</b>	I cannot find your consultation document on Houses of Multiple Occupancy. However, I would like to say I certainly wouldn't not like one anywhere near where I live. If there was one it would make me feel very unsafe and would mean I wouldn't go out alone day or night.
<b>Local Planning Authority response</b>	The draft HMO SPG provides additional planning guidance for HMO planning applications, but does not propose any specific HMOs across the County Borough. The occupation of HMOs is beyond the scope of the land use planning system
<b>Resultant action</b>	None required.

## **Proposed SPG changes as a result of the consultation**

The paragraphs proposed for amendment following the consultation are detailed below, for the reasons explained in the previous table. Strikethrough text is used to indicate proposed deletions from the SPG, whereas blue text is used to indicate proposed additions to the SPG. Only paragraphs proposed for amendment are included below, there are no proposed changes to the remainder of the draft SPG following consultation. The final draft version of the SPG (**Appendix 1**) incorporates the proposed amendments below.

1. Insert a bullet point under paragraph 5.5 clarifying that hotel premises used for temporary accommodation are generally not considered as HMOs, unless in specific circumstances. This paragraph sits underneath a sub-heading titled 'Exclusions', and specifically sets out which types of residential arrangements that are not typically considered HMOs for planning purposes. Such proposals will not be considered against Policy COM7. The inserted wording (amendment) will read as follows:

*'Hotel premises used for short-term temporary accommodation – A hotel building used to provide temporary accommodation for non-holiday residents, such as homeless households, which does not operate as a hotel in the conventional sense, is typically regarded as a 'sui generis' use.'*

2. Alter the wording of the fourth sentence of paragraph 5.6, an insertion to require the consultation of Shared Regulatory Services (who manage HMO Licensing) on all HMO planning applications. This will now read as follows:

*'However, Shared Regulatory Services (SRS), who oversee the licensing and management of HMOs in Bridgend County Borough, ~~should~~ will be consulted on all planning applications for HMOs to ensure alignment between planning and housing enforcement considerations.'*

3. Insert a new headed section under the heading, 'Policy COM7: Criterion 6' of the SPG, titled 'HMOs and Security' after paragraph 6.46, as paragraph 6.47, to read as follows:

### *'HMOs and Security'*

*Applicants are encouraged to design HMOs in accordance with Secured by Design (SBD) principles and are advised to aim to achieve the SBD 'Gold' award (an award that acknowledges crime and anti-social behaviour reduction measures relating to layout, environmental design and the use of Police Preferred Specification products), where practicable.'*

# A Guide to Planning, Licensing and Building Regulations for Houses in Multiple Occupation

## 1. Introduction

Houses in Multiple Occupation (HMOs) are regulated through three separate regimes: **planning, licensing, and building regulations**. These regimes often overlap but each deal with different aspects of HMOs. It is common for applicants, landlords, and residents to be unsure which rules apply to which issues.

This short guide sets out, in clear terms, the role of each regulatory regime and the issues they cover, supported by a summary table of responsibilities.

## 2. Planning

Planning regulates land use, development, and the impact of HMOs on their surroundings. It focuses on the *impacts* of an HMO, not its day-to-day management or specifics regarding the identity of occupiers (only the use of land/property and its *nature of occupation*).

### Planning covers:

- **Change of use** to an HMO (e.g., C3 (dwellinghouse) → C4 (House in multiple occupation), large HMO sui generis (uses that do not fall within any other use class)).
- **Planning applications for new-build HMOs.**
- **Impact on local character:** avoiding over-concentrations of HMOs, amenity, community balance, intensity of use.
- **Impact on neighbours (residential amenity):** including the potential for noise and disturbance (*not* noise complaint management).
- **Physical extensions or alterations** requiring planning permission.
- **External design and appearance.**
- **Amenity standards** (planning level): communal spaces, bin storage, clothes drying area, etc. (if specified in Local Development Plan policy).
- **Location-related issues:** i.e. access, parking pressure, cycle storage.

## 3. Licensing

Licensing focuses on the safe and proper management of HMOs and the suitability of landlords and agents. It is concerned with health, safety and the welfare of occupiers. While issued by Shared Regulatory Services' (SRS) Licensing team, licensing standards are enforced by Environmental Health.

### Licensing covers:

- **Mandatory HMO licensing:** properties with 5 or more residents forming more than one household; comprising three or more storeys; and sharing basic amenities.

- **Additional or selective licensing schemes** for smaller HMOs (not applied by Bridgend County Borough Council).
- **Sets minimum room sizes and ensures there are sufficient facilities**
- **Suitability of the landlord/agent**
- **Management standards**, including:
  - Providing information to occupiers;
  - Taking fire and general safety measures;
  - Maintaining water, gas, electricity supplies;
  - Keeping common parts, fittings, and appliances in good order;
  - Maintaining living accommodation; and
  - Providing proper waste disposal.
- **Assesses housing standards under the Housing Health and Safety Rating System**
- **Overcrowding and maximum occupancy**
- **Conditions requiring ongoing compliance**

## 4. Building Regulations

Building Regulations ensure HMO development meets minimum safety / quality standards.

### Building regulations cover:

- Ensure compliance with standards relating to:
  - Fire safety (means of escape, fire doors, protected corridors, signage, etc.);
  - Emergency lighting;
  - Structural safety;
  - Sound performance standards;
  - Drainage, sanitation, ventilation; and
  - Thermal performance and energy efficiency.
- Apply when a property is converted, extended, or altered for use as an HMO.  
Houses/Flats converted to HMOs that are occupied by people who share a tenancy, share bills and where the property does not have individual locks on doors would *not* be required to apply for building regulations approval.

## 5. Summary: Who covers what?

Issue/Requirement	Planning	Licensing	Building Regs
Change of use to an HMO	✓	✗	✗
Neighbour/Amenity impacts*	✓	✗	✗
Parking, access, waste storage	✓	✗	✗
Room sizes	✗	✓	✗
Occupancy levels	✗	✓	✗
Fire safety systems	✗	✓	✓
Thermal performance	✗	✗	✓
Gas/Electrical safety checks	✗	✓	Partial coverage
Condition & management	✗	✓	✗

\*Planning considers only potential amenity impacts, not noise-complaint enforcement.

# Agenda Item 8

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>UPDATE ON THE UK GOVERNMENT'S PRIDE IN PLACE IMPACT FUND ALLOCATION FOR BRIDGEND COUNTY BOROUGH</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CORPORATE DIRECTOR COMMUNITIES CABINET MEMBER FOR REGENERATION, ECONOMIC DEVELOPMENT AND HOUSING</b>
<b>Responsible Officer:</b>	<b>DELYTH WEBB GROUP MANAGER STRATEGIC REGENERATION</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the policy framework or procedure rules.</b>
<b>Executive Summary:</b>	<b>The purpose of this report is to provide an update on the recently announced UK Government's Pride in Place Impact Fund and the allocation of funds to Bridgend County Borough Council and to seek Cabinet's approval for the Director of Communities to progress the relevant programme and delivery mechanisms, including a capital grant scheme.</b>

## 1. Purpose of Report

1.1 The purpose of the report is to provide an update on the recently announced UK Government's Pride in Place Impact Fund and the allocation of funds to Bridgend County Borough Council. It sets out a proposal for spend across the County Borough,

which Cabinet is asked to endorse and seeks delegated authority for the Director of Communities to finalise the relevant programme and delivery mechanisms including the establishment of a capital grant scheme.

## 2. **Background**

- 2.1. Launched in September 2025, the Pride in Place Strategy is the UK Government's plan to create safer, healthier neighbourhoods where disadvantaged communities across the country can thrive. The strategy provides a long-term vision for communities, empowering them with the tools and levers to drive meaningful change that reflects their priorities.
- 2.2. The aim of the Pride in Place Impact Fund is to immediately address issues that matter locally such as ensuring that high streets live up to their potential or creating spaces to enable communities to connect and thrive.
- 2.3. Funding from the Impact Fund can be spent anywhere in the local authority area, whilst being mindful of the importance of supporting communities most in need, but also being mindful of creating the impact which the funding aims to invest in.
- 2.4. The fund will support capital improvements that reflect the pride and potential of the area. How these changes take shape will however vary, informed by local context and priorities.
- 2.5. The funding is underpinned by three core objectives:

**High street and town centre revitalisation:** making these areas more attractive and welcoming places where people congregate and which encourage economic activity. Examples of initiatives that could be funded are shop frontage improvements, adaptations that bring premises back into use, streetscape improvements, public art, trails and wayfinding.

**Community spaces:** creating, extending, improving or refurbishing existing community facilities and enabling community organisations to take control or ownership of underused but valued local assets.

**Public spaces:** enhancing the physical environment in public spaces - examples of initiatives include new or improved green spaces or public squares, improved outdoor play, sports and leisure spaces, installing street furniture, public art or wayfinding.

- 2.6. Local authorities can use the objectives to invest across a range of activities that represent the right responses to local needs and opportunities. There is no requirement to undertake projects under all three objectives, investment may be focused on one objective if that is the right approach for the area.

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

#### Proposed Delivery in Bridgend County Borough

- 3.1. Bridgend County Borough Council has been allocated £3 million from the Pride in Place Impact Fund to be spent during the current financial year and in 2026/27.
- 3.2. Funding may be spent anywhere in the county borough, providing that it delivers against one or more of the fund objectives outlined in paragraph 2.5. Due to the funding and timing constraints, it will be essential to target priority areas where the most immediate, visible and far-reaching improvements can be achieved within the funding timescales.
- 3.3. The Council will need to comply with the terms and conditions as set out in the Memorandum of Understanding (MoU) and grant determination from the Ministry of Housing, Communities and Local Government (MHCLG) and demonstrate the achievement of eligible spend and delivery against the fund objectives and progress metrics.
- 3.4. The MOU has been received and reviewed by our Legal and Finance teams to ensure we have a sound understanding of all requirements.
- 3.5. The fund has recognised work already being undertaken and provides the opportunity to build on the current momentum gained by investment from the Welsh Government Transforming Towns and the UK Shared Prosperity Fund. Investing the fund in town centre regeneration will not only result in immediate improvements to the overall attractiveness of the streetscape but will lead to increased footfall, reduced vacancy rates, a boost to the local economy, increased investor confidence and a greater sense of community pride in the longer term. With the delivery infrastructure already in place, immediate impact can be achieved.
- 3.6. It is proposed to allocate the delivery programme across two primary investment channels, to ensure we focus on investment in both town centres and across our wider communities

#### **Strategic Investment in our town centres**

- 3.6.1 This element of the programme will enable us to invest in property, assets and high street regeneration which could encompass support for leisure, culture and environmental projects which contribute to our placemaking plans.
- 3.6.2 This allocation would be set aside to develop a fund for an acquisition and asset redevelopment programme. A programme of spend will be developed to include:
  - Acquisition of town centre assets to accommodate small business and residential use

- Commercial capital grants to large projects
- Green spaces and environmental enhancements.

### **Community Infrastructure Fund**

3.6.3 A funding scheme to split into 2 strands to ensure that the breadth of projects across the County can be considered.

3.6.4 Expressions of Interest for Projects up to £300,000 and in excess of £25,000

3.6.5 Expressions of interest will be invited for large capital schemes, that provide an immediate and visible benefit to our communities. Schemes will have to evidence deliverability within the short time frame, be fully costed, be endorsed by their local member and wider community and demonstrate alignment with the fund objectives.

3.6.6 A capital small grant programme of £100,000 for projects up to £25,000 will also be established and targeted at community organisations to deliver complementary activity in line with the fund objectives.

3.7 Working with local stakeholders, the Council will ensure that the investment complements other activities in the area and achieves greatest impact by increasing pride in place and longer-term economic growth and opportunity.

3.8 Letters of recommendations and ideas have been received by all three Members of Parliament (MP's) with constituencies across the County Borough and regular meetings are established providing opportunities to review delivery.

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

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

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

5.1 The Well-being of Future Generations (Wales) Act 2015 Assessment based on the 5 ways of working has been considered:

- Long Term - Investment in, and redevelopment of our town centre and community assets is critical to developing confidence in and growing the economy, ensuring local investment while providing the ability to operate across the region and beyond. Investment is essential to securing long term

sustainability and contribution to the reduction in carbon emissions of our infrastructure and assets.

- Prevention - Investment in capital assets now will prevent further decline. It will also prevent a decline in local environment and the quality of cultural and business facilities within our communities.
- Integration – The funds will ensure that local facilities will be enhanced and will need to evidence integration within their local communities. Communities will be able to make better use of existing facilities and will be provided with greater social opportunity, employment and pride in their community.
- Collaboration - The success of the project will be founded on cross sector working and collaborative effort with our delivery partners, stakeholders and professional advisors to use creative and cultural activity to improve population well-being.
- Involvement - The success of this project will rest on effective engagement with key public and operational stakeholders.

5.2 There are no significant or unacceptable impacts upon the achievement of the Council's well-being goals/objectives.

## **6. Climate Change and Nature Implications**

6.1 Taking action to support decarbonisation is critically important in order to protect and sustain the environment over the long term. Delivery proposals will be asked to demonstrate how they will contribute to these goals.

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

7.1 Due regard has been paid to the Council's Safeguarding Policy which seeks to safeguard and promote the wellbeing of children, young people and adults at risk of abuse or neglect and to ensure that effective practices are in place throughout the Council and its commissioned services. Given the subject matter of this report no negative safeguarding implications have been identified.

## **8. Financial Implications**

8.1 There is maximum funding of £3 million available from the Pride in Place Impact Fund over two financial years with the allocation split equally, with 50% awarded in 2025/26 and 50% in 2026/27.

8.2 Although the funding award is split equally over the two financial years, there is no requirement to profile spend equally. Spending plans can be aligned over the two financial years in line with delivery priorities, and it is permissible for the majority of spend to be in 2026/27. Any uncommitted funding as at 31 March 2027 must be repaid to the MHCLG.

8.3 The funding has been awarded under Section 50 of the United Kingdom Internal Market Act 2020 and is a non-ringfenced grant that can only be used to fund capital expenditure.

8.4 Match funding is not required although local authorities are encouraged to consider contributions from the private, public and third sectors to maximise the impact of the fund.

## **9. Recommendations**

It is recommended that Cabinet: -

- Note the contents of this report, considering the allocation of funds provided by the UK Government's Pride in Place Impact Fund and the opportunities it presents.
- Endorse the proposed delivery of the Pride in Place Impact Fund in Bridgend County Borough as set out in section 3 of the report.
- Delegate authority to the Director of Communities, in consultation with the Chief Officer - Legal & Regulatory Services and HR, Chief Officer – Finance, Housing and Change in consultation with the relevant Cabinet Member, to finalise the programme and delivery mechanisms including the establishment of a capital grant scheme.

## **Background documents:**

None

# Agenda Item 9

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>SCHOOL ADMISSIONS POLICY 2027-2028 AND CO-ORDINATED ADMISSIONS ARRANGEMENTS 2028-2029</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CORPORATE DIRECTOR – EDUCATION, EARLY YEARS AND YOUNG PEOPLE</b> <b>CABINET MEMBER FOR EDUCATION AND YOUTH SERVICES</b>
<b>Responsible Officer:</b>	<b>ROBIN DAVIES</b> <b>GROUP MANAGER – STRATEGY, PERFORMANCE AND SUPPORT</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the policy framework or procedure rules.</b>
<b>Executive Summary:</b>	<p><b>The admission of pupils is a statutory responsibility, which supports the raising of educational standards and the well-being of children, young people and their local communities.</b></p> <p><b>The applicable legislation requires that the school admission arrangements for 2027-2028 are determined by 15 April 2026 and that the local authority formulates and adopts Co-ordinated Admissions Arrangements annually.</b></p>

## 1. Purpose of report

1.1 The purpose of this report is to seek Cabinet approval for the School Admissions Policy 2027-2028 (see Appendix A) and to advise Cabinet that the previously approved and adopted Co-ordinated School Admissions Arrangements 2027-2028 have been adopted without change for 2028-2029.

## 2. Background

2.1 Welsh Government's School Admissions Code 2013 (the Code) imposes requirements on local authorities and admission authorities, regarding the discharge of duties in respect of school admissions. The Council must act in accordance with the Code, as determined by the School Standards and Framework Act 1998.

- 2.2 As part of the statutory process, the local authority has a duty to consult with stakeholders as identified in the Code. This includes the governing bodies of all schools in Bridgend (including voluntary-aided and voluntary-controlled schools), all neighbouring local authorities and the bodies representing the religion or religious denomination of faith schools in Bridgend.
- 2.3 The local authority is required to publish annually an admissions policy and guidance on the admission arrangements for its schools. These are published on the local authority's website.

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

- 3.1 In October 2025, Bridgend Admissions Forum agreed a draft School Admissions Policy for 2027-2028, as per the requirements under the Code.
- 3.2 The consultation on the 2027-2028 policy took place with all parties between 27 October 2025 and 28 November 2025.
- 3.3. There were no responses received. Therefore, the proposed School Admissions Policy for 2027-2028 is attached at Appendix A.
- 3.4 There is no requirement to consult on the Co-ordinated Admissions Arrangements 2028-2029, as the scheme is not substantially different from the qualifying scheme adopted for the preceding determination year (that is, 2027-2028). Therefore, under the Education (Co-ordination of School Admission Arrangements and Miscellaneous Amendments) (Wales) Regulations 2024, the local authority is able to adopt the current scheme (with minor amendments to relevant dates).

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

- 4.1. An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.
- 4.2 It is a statutory duty that admission authorities are mindful of their duties with regards to equalities legislation. The School Admissions Policy 2027-2028 adheres to these requirements.
- 4.3 A Welsh Language Impact Assessment has been carried out (see Appendix C). The outcome of the assessment is that the local authority's proposed School Admissions Policy for 2027-2028, should have a neutral impact on opportunities for persons to use the Welsh language, opportunities to promote the Welsh language, the Council's compliance with the statutory Welsh Language Standards and treating the Welsh language no less favourably than the English language.
- 4.4 Once approved and published, the School Admissions Policy 2027-2028 and the adopted Co-ordinated School Admissions Arrangements 2028-2029, will be accessible to all residents online at:

<https://www.bridgend.gov.uk/residents/schools-and-education/school-admissions/apply-for-admission-to-school/>.

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

5.1 The Well-being of Future Generations (Wales) Act 2015 provides the basis for driving a different kind of public service in Wales, with five 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. It is anticipated that there will be no significant or unacceptable impact upon the achievement of the well-being goals or objectives because of this report.

5.2 A summary of the implications from the assessment relating to the five ways of working is as follows:

### **Better and more targeted use of resources**

The school admissions policy sets out how the local authority will balance the discharge of its statutory duty in relation to parental preference, the need to safeguard the delivery of effective education and the safety of pupils, and the need to support pupils in particular circumstances (for example, learners with specific vulnerabilities), in circumstances where the applications for places at a school exceed the number of available places.

### **Protecting the services that matter to you the most**

Consultation on the school admissions policy allows stakeholders to raise issues or make comments on proposals, for consideration of appropriate actions. Access to good education, raising standards of achievement and ensuring children have equal opportunities to realise their potential, wherever they may reside, are critical to helping young people acquire the knowledge and skills they need for work. The School Admissions Policy 2027-2028 ensures the statutory requirements are met to provide an admissions system that is accessible to all, encompassing the principles of fairness, consistency and openness across all aspects of school admissions. It plays a crucial role in delivering equality of opportunity.

### **Supporting and empowering communities**

The school admissions policy supports the provision of education in the communities in which pupils live. The School Admissions Policy 2027-2028 has regard to the general principle that pupils are to be educated in accordance with the wishes of their parents/carers, so far as that would be compatible with the provision of efficient education and the avoidance of unreasonable public expenditure (S.9 Education Act 1996).

### **One council, working well together and with partners**

Each year, the local authority works in conjunction with key stakeholders to develop proposed school admission arrangements, for those schools for which it is the admissions authority.

## **Improving communication, engagement and responsiveness**

In accordance with the specified requirements of the Education (Determination of Admission Arrangements) (Wales) Regulations 2006 and the School Admissions Code 2013, the local authority consults each year on the proposed admission arrangements for those schools for which it is the admissions authority.

### **6. Climate Change and Nature Implications**

6.1 The local authority, as the admission authority, has a strategic role in considering the impact of net zero carbon and how to deliver this important national initiative.

The School Admission Policy is a material consideration in respect of the eligibility of pupils to free home-to-school transport. Where there is eligibility for local authority-provided free home-to-school transport, this may increase associated carbon emissions. Conversely, where pupils are not eligible to free home-to-school transport and walk or cycle to school, this may increase their engagement with nature.

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

7.1 The Education (Admission of Looked after Children) (Wales) Regulations 2009 places a duty on the admission authority to admit children looked after by the local authority, where an application is made by the corporate parent on their behalf. The School Admissions Policy 2027-2028 ensures that the local authority, adheres to this statutory requirement.

### **8. Financial implications**

8.1 There are no financial implications regarding this report.

### **9. Recommendation(s)**

1. Cabinet is recommended to approve the School Admissions Policy 2027-2028 (Appendix A).
2. As there are no substantive changes to the arrangements from the preceding year, Cabinet is recommended to acknowledge the adoption of the Co-ordinated School Admissions Arrangements 2028-2029 (Appendix B).

### **Background documents:**

None

Mae'r ddogfen hon ar gael yn Gymraeg. / This document is available in Welsh.



# School Admissions Policy 2027-2028

(1 September 2027 – 31 August 2028)



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## **1. The admission authority**

The entry of children to schools is controlled and administered by an 'admission authority'. In the case of community schools in Bridgend, the admission authority is Bridgend County Borough Council (also referred to in this document as 'the local authority').

In accordance with the Education (Relevant Areas for Consultation on Admission Arrangements) Regulations 1999, the relevant area for the admission authority is the geographical area of the County Borough of Bridgend.

Where the local authority is the admission authority, the school's governing body is under a duty to implement the local authority's decisions on applications, and to act in accordance with the local authority's admission arrangements.

**The local authority continuously reviews and reserves the right to amend its admissions procedures for statutory and non-statutory education.**

The local authority has no arrangements for the provision of education at schools not maintained by the local authority.

### **1.1 Admission to voluntary controlled schools**

The one voluntary controlled school in the Bridgend County Borough is Pen y Fai Church in Wales Primary School, which is financed by the local authority. The admissions criteria are consistent with that of the local authority, as detailed in this policy, and with the Trust Deed of the school. Appeal arrangements are managed by the local authority and are consistent with the provision of the Trust Deed.

### **1.2 Admission to voluntary aided schools**

There are five voluntary aided schools in the Bridgend County Borough, which are financed largely by the local authority. These are:

1. St Mary's Catholic Primary School
2. St Mary's and St Patrick's Catholic Primary School
3. St Robert's Catholic Primary School
4. Archdeacon John Lewis Church in Wales Primary School
5. Archbishop McGrath Catholic High School

### 1.3 Co-ordinated School Admission Arrangements

In line with new Welsh Government regulations, The Education (Co-ordination of School Admission Arrangements and Miscellaneous Amendments) (Wales) Regulations 2024 all local authorities in Wales are required to formulate a coordinated school admissions scheme for all maintained mainstream schools in their area, from the 2027-2028 school year.

Co-ordinated schemes are intended to simplify the admissions process for parents/carers whilst reducing the likelihood of any child being left without a school place. Co-ordination establishes a mechanism that ensures that, as far as is reasonably practicable, every parent/carer of a child living in a local authority area, who submits an application within the normal admissions round, is sent one, and only one, offer of a school place by their local authority.

The local authority will co-ordinate admission arrangements for applications in the normal admission rounds, that is, Reception and Year 7. Applications can be completed online through sign up to 'My Account' on the Bridgend County Borough Council website. Applicants can state their order of preference when applying and all preferences listed on the application are considered under the admission rules for each school.

The governing body of each voluntary aided school is the admission authority with responsibility for all admission arrangements. Voluntary-aided schools have their own published oversubscription criteria, as detailed in their School Admissions Policy 2027-2028, which are available directly from the schools.

The coordinated admissions arrangements do not apply to applications for nursery places, sixth form places, or places at maintained special schools.

The co-ordinated school admission arrangements do not apply to in-year admissions/transfer applications.

The co-ordinated school admission arrangements for Reception and Year 7 include all community schools and the following voluntary-aided schools:

- Archdeacon John Lewis Church in Wales Primary School;
- St Mary's Catholic Primary School;
- St Mary's and St Patrick's Catholic Primary School;
- St Robert's Catholic Primary School; and
- Archbishop McGrath Catholic High School.

The governing body of each voluntary aided school is the admission authority with responsibility for all admission arrangements.

## **1.4 Admissions to sixth forms**

The local authority is the admitting authority for Post-16 admissions to sixth forms in the community schools within the Bridgend County Borough. However, the individual schools administer the admission arrangements on behalf of the local authority. Therefore, applications in this category should be made directly to the school.

While the local authority has a policy of open access to schools' sixth forms, the individual schools are responsible for determining and issuing entry criteria on sixth-form admissions.

Admission arrangements for other Post-16 further education institutions are determined by those institutions and applications should be made directly to the institution/s concerned.

## **1.5 Admissions to special schools**

The two special schools in the Bridgend County Borough are Heronsbridge School and Ysgol Bryn Castell. Admissions to these schools are not included within, or subject to the provisions of this policy.

## **2. Parental preference**

### **2.1 The duty to comply with parental preference**

In relation to admissions to primary schools (excluding nursery classes), junior schools and secondary schools (including sixth-forms), the local authority has a statutory duty to have regard to the general principle that pupils are to be educated in accordance with the wishes of their parents/carers, so far as that would be compatible with the provision of efficient education and the avoidance of unreasonable public expenditure (S.9 Education Act 1996).

The local authority applies the same principle of parental preference to applications for non-statutory, nursery education in a local authority-maintained school.

The duty of the local authority to comply with parental preference does not apply where:

1. To admit would be incompatible with the statutory duty to meet infant class size regulations.
2. To admit the child would prejudice the provision of efficient education or efficient use of resources.

3. Where arrangements for entry to a school's sixth form are based wholly on selection by reference to ability or aptitude and compliance with the preference would be incompatible with selection under those arrangements.
4. The child has been permanently excluded from two or more schools. Where this is the case, the local authority is not required to comply with parental preference for a school place for a period of two years from the first school day of the second exclusion.

This disapplication from the requirement to comply with parental preference does not apply to:

- pupils who were below compulsory school age when they were excluded;
- pupils who were reinstated after permanent exclusion or pupils who would have been reinstated following a permanent exclusion had it been practicable to do so;
- pupils with statements of special educational need;
- pupils who are looked-after (the application for admission must be made by the corporate parent), or previously looked-after children (the application for admission must be accompanied by evidence of the previously looked-after status).

## **2.2 Compliance with parental preference**

Within the Bridgend County Borough, each school has an area it serves (its catchment); however, the local authority must allow all parents/carers the opportunity to express a positive preference for the school they wish their child to attend. While most parents/carers are happy to choose their catchment school, it is necessary for that school to be selected by parents/carers on a school admission or in-year school admission/transfer application. The application allows parents/carers to list more than one school in order of preference. The local authority will offer a place at the highest available preferred school.

The local authority is committed to the principle of providing local schools for local children and will make every effort to ensure that parents/carers are able to secure a place for their child/ren at the catchment school, where parents/carers have expressed a positive preference for that school. However, parents/carers must not automatically assume that a place will be available for their child at their catchment school, or any particular school.

The local authority will meet the preferences for admission expressed by parents/carers ahead of those who have expressed no preference. Consequently, for the admissions rounds, parents/carers must ensure they record their preference/s on the school admission application and that the application is submitted to the local authority by the stated deadline.

## 2.3 Changes to an expressed parental preference

For admission rounds, if the parent/carer wishes to make a change to the school preference/s after the application has been submitted to the local authority:

1. The change must be notified to the local authority **in writing** (email or letter).
2. If the change is notified to the local authority **before** the published closing date for the admission round, the change will be taken into consideration in the application of oversubscription criteria and the allocation of places.
3. If the change is notified to the local authority **after** the closing date for the admission round, the school preference/s recorded on the application will be used in the application of oversubscription criteria and the allocation of places. The parent/carer will have the option to complete and submit a late application if the allocated place is at a school that is no longer the preferred school, which would be subject to the provisions relevant to late applications (see section 13.1). However, in these circumstances, the local authority will offer the applicant the option to, instead, maintain the original application and school preference/s.

The admission application form will indicate the maximum number of school preferences that a parent/carer can express. A parent/carer may choose to express a lesser number of school preferences. However, in such a situation, if the local authority cannot offer a place at any preferred school, the local authority will take no further action in respect of the application. The parent/carer will be required to complete and submit a new application for any alternative school, which will be processed as a late application in accordance with the provisions of section 13.1.

## 3. School catchment areas

### 3.1 Welsh-medium schools

There are no catchment areas for the Welsh-medium schools within Bridgend.

### 3.2 All other schools

[School catchment area maps](#) are published on the local authority's website.

Catchment areas are subject to change, with any changes being subject to consultation prior to implementation.

**There is no right to, or guarantee of, an offer of a place at a child's catchment area school.**

## **4. School capacity and published admission number**

The capacity of a school is the number of pupil places it contains.

Welsh Government has published a capacity calculation methodology for all schools. This aims to provide a robust and consistent method of assessing the pupil capacity of all community, voluntary aided, voluntary controlled and foundation schools in Wales.

A school's calculated capacity is based on existing accommodation at a school and its usage. For statutory-age year groups (Reception to Year 11) the calculated capacity informs the published admissions number for a school.

Appendix A provides the published admission numbers for all schools for which the local authority is the admitting authority.

For a normal year of entry (that is, Reception and Year 7), the local authority must admit pupils up to the published admission number (with the exception of twice-excluded pupils – see section 2).

For all other years, it is not a statutory requirement that the local authority admits pupils up to the published admission number, although the local authority will generally do so. However, in the case of infant classes (Reception, Year 1 and Year 2), infant class size legislation is relevant (see section 5). The local authority is entitled to refuse admission for places in any year other than the normal year of entry (that is, Reception), if offering a place would result in class size prejudice (for example, necessitating that the school employs an additional teacher or creates another classroom when it does not have the resources to do so). This means that the local authority may refuse admission to Year 1 and Year 2 if offering a place would result in class size prejudice, even if the admission number has not been reached in relation to these year groups.

As the published admission number reflects the school's ability to accommodate pupils, the local authority will only exceed the published admission number in exceptional circumstances.

## **5. Infant class size limit**

In order to improve educational standards in schools, The School Admission (Infant Class Size) (Wales) Regulations 2013 limit the number of children in Reception, Year 1 and Year 2 classes to 30 when a single qualified teacher is present.

The local authority will refuse admission to classes in these year groups if an admission would result in the infant class size limit being breached, giving rise to infant class size prejudice, unless the situation is such that an exception to the infant class size limit is permitted by the legislation.

In relation to the Reception year, infant class size prejudice does not arise if the number of pupils in the Reception year has not reached the school's published admission number.

Decisions on the structure of classes at a school are reserved to the headteacher. If a headteacher decides to operate a mixed-age class where some of the pupils in the class are Reception, Year 1 or Year 2 pupils, the infant class size limit will only apply if the majority of the pupils in the class are Reception, Year 1 or Year 2 pupils.

## **6. Welsh-medium education**

There are four Welsh-medium primary schools and one Welsh-medium secondary school located within Bridgend County Borough.

Admission to the Welsh-medium schools in the Bridgend County Borough is controlled by the provisions and criteria specified within this policy.

There are no catchment areas for the Welsh-medium schools in Bridgend.

A parent/carer can make an application for a place for their child at any Welsh-medium school within the county. However, if a parent/carer chooses to apply for place at a Welsh-medium school that is not the nearest Welsh-medium school to the child's place of ordinary residence, and that application is successful, there is no entitlement to free home-to-school transport to that requested school.

Eligibility for school transport only applies where the child's place of ordinary residence is more than two miles from the nearest Welsh-medium primary school or three miles from the nearest Welsh-medium secondary school.

## **7. Transport arrangements to attend schools in other local authorities**

The local authority has in place, the following transport arrangements for pupils wishing to attend schools in other local authority areas:

1. Parents/carers of pupils who live within the catchment area of Abercerdin Primary School may apply to Rhondda Cynon Taf County Borough Council for a school place for their child at Tonyrefail Comprehensive School and, if successful, Bridgend County Borough Council will be responsible for transport, subject to the statutory distances.

**It is important that parents/carers understand that transport is provided from Year 7 to Year 11 only. No transport is provided for Years 12 and 13.**

## **8. Ensuring fair access**

Particular considerations apply in respect of specific groups of children, as detailed below.

The local authority has a Mainstream Fair Access Panel. The panel can consider and make decisions on applications for mainstream school places for individual children within these specific groups, in accordance with the defined terms of reference.

### **8.1 Children from overseas and UK children living abroad**

Welsh Government has issued guidance for admission authorities when processing applications for overseas children. The local authority will process all such applications in accordance with the published guidance.

### **8.2 Children in receipt of a statement of special educational needs (SEN) or a local authority-maintained individual development plan (IDP)**

Where a mainstream place in a community school is the named placement in a final statement of SEN or a local authority-maintained IDP, following consultation, the local authority will admit the child to that school.

### **8.3 Children with additional learning needs (but without a statement of SEN or a local authority-maintained IDP)**

Applications in respect of such children will be considered in the same way as all applications on the basis of the procedures and admission criteria set out in this policy.

If a child is currently being assessed under the ALN system and, at a later date, the local authority concludes that the child should have a local authority-maintained IDP, the appropriate school placement will be addressed as part of that statutory process.

### **8.4 Children with disabilities**

The local authority will comply with the reasonable adjustments duty owed to disabled pupils, as defined in the Equality Act 2010.

### **8.5 Children with challenging behaviours**

The local authority will not refuse to admit a child on the basis of his/her behaviour. Such children will include those who are considered to be potentially disruptive, exhibiting challenging behaviours or those who may be considered as requiring assessment for special educational needs.

After admission, a school may consider such disciplinary action as appropriate, in response to challenging behaviour. However, children exhibiting challenging behaviours

may be disabled as defined by the Equality Act 2010 and require reasonable adjustments to be made for them in school.

## 8.6 Looked-after and previously looked-after children

In respect of looked-after children, the following provisions apply even if the corporate parent is Bridgend County Borough Council.

### Admissions rounds

Applications in respect of looked-after and previously looked-after children are prioritised under the applicable oversubscription criteria, **subject to:**

1. The application for a looked-after child is completed and submitted by the corporate parent (that is, the local authority with responsibility for looking after the child) and supporting evidence is provided (a Care Order or Interim Care Order).
2. The application for a previously looked-after children is accompanied by supporting evidence from the former corporate parent.

### In-year admissions/transfers

In accordance with the statutory School Admissions Code 2013, where in-year admission/transfer of a looked-after child is being sought, the corporate parent must consult with the local authority before making the application. This is to ensure the appropriateness of the preferred school in light of the child's background and circumstances. This consultation and completion of an application is also required in respect of looked-after children who have been permanently excluded from two or more schools.

Additionally, in the case of a looked-after child who has been permanently excluded from two or more schools, the corporate parent must also consult with the governing body of the identified school.

In both instances, the consultation need not be onerous.

For applications for in-year admission/transfers in respect of looked-after children, a place will be offered at the agreed school and an exception to the infant class size limit (if relevant) will be applied, **subject to** the application having been completed and submitted by the corporate parent (that is, the local authority with responsibility for the child) and supporting evidence having been provided (a Care Order or Interim Care Order).

For applications for in-year admission/transfers in respect of previously looked-after children, a place will be offered at the preferred school and an exception to the infant class size limit (if relevant) will be applied, **subject to** the application being accompanied by supporting evidence from the former corporate parent.

The relevant supporting evidence referred to above must be submitted with the application.

## **8.7 Gypsy, Roma and Traveller children**

When considering admission applications relating to Gypsy and Traveller children, the local authority will take account of Welsh Government Circular No: 003/2008 (Moving Forward – Gypsy Traveller Education) and sections 3.25 and 3.26 of the statutory School Admissions Code for Wales, 2013.

## **8.8 Children of serving UK service personnel and other serving Crown Servants (including diplomats)**

‘UK service personnel’ refers to persons serving in the military forces. ‘Crown Servants’ are officers of the UK government, including diplomats.

There is no automatic right to a place at a preferred school for children of serving UK service personnel and other serving Crown Servants.

The local authority will accept a ‘unit’ postal address for applications from serving service personnel in the absence of a new home postal address.

For normal admissions rounds, the local authority will treat children of serving UK service personnel and serving Crown Servants as if they are already resident at a future address **provided that** the application is accompanied by an official Ministry of Defence (MOD) or Foreign and Commonwealth Office (FCO) letter declaring a return date and confirmation of the new home. The local authority will allocate a school place in accordance with the applicable criteria for the relevant admission round.

In respect of in-year admission/transfer applications for children of serving UK service personnel and serving Crown Servants:

- such children will be given ‘excepted status’ for infant class size limit purposes (if relevant), if admitted to a preferred school;
- if the application is unsuccessful and a place at the preferred school is refused, the parents/carers may appeal against the decision and any appeal hearing would be heard as a normal prejudice appeal.

Applications for children of former UK service personnel or former Crown Servants will be treated as all other applications.

## **8.9 All vulnerable or hard-to-place children**

The provisions of this policy will apply. Additionally, the local authority has a fair access protocol and a fair access panel that may consider the admissions of such children.

## **8.10 School ‘managed moves’**

The local authority has a separate protocol for the managed moves (transfers) of pupils between schools.

Managed moves of pupils are treated differently to regular admissions. However, the local authority will apply the provisions of this policy in the identification of a suitable school or schools.

The pupil will remain on roll at the current school during the managed move period. At the end of the managed move period, if the managed move is deemed successful, the pupil will be placed on roll at the receiving school, subject to the parent/carer completing a school admission application requesting the school. If the managed move is deemed to have been unsuccessful, the pupil will return to the school at which they are on roll.

The Managed Move Protocol does not apply in any instances where the parent/carer completes a school admission application in advance of the managed move; the School Admissions Policy applies in all such cases.

## **9. Requests for admission outside of the normal age group**

Occasionally, a parent/carer or school may seek a place outside of the chronological age group for a child who they consider to be gifted/talented or experiencing problems, or who has missed part of a school year, for example, due to ill health.

The local authority’s Mainstream Fair Access Panel will consider each request carefully and make decisions on the basis of the circumstances of each case. The panel will consider what is most beneficial for the child and, in every case, will consider information from appropriate parties to inform its decision.

If the panel decides that an out-of-year group application is appropriate, but that application is refused due to no places being available in the requested year group at the school, the parents/carers have a statutory right of appeal. However, there is no right of appeal if the local authority has offered a place but not in the requested year group (that is, where the place offered is in the correct year group for the child’s chronological age).

If the panel decides that an out-of-year group application is appropriate and the application is for a Part-time Nursery place in the following January or April, or a Full-time Nursery, Reception, junior school Year 3 or secondary school Year 7 place from the following

September, the application will be subject to, and considered in accordance with, the conditions and criteria applicable to those admissions rounds.

## **10. Information or circumstances that the local authority does not consider when making admission decisions**

The following is not an exhaustive list, but details the principal information and circumstances that have no bearing on admission decisions:

- Any school that the child has previously attended.
- Any particular school that the child might attend in the future.
- A parent/carer communicating to any school that there is an intention to apply for a place at the school. This would include any instance when a parent/carer believes that they have 'registered' their child's name for a place at the school.
- An invitation to, or attendance by a child, at a 'taster'/transition day at any school.
- Allowance by any school of a visit by the parents/carers and/or child.
- Any indication either explicitly given, or assumed by a parent/carer to have been given, by a school that there are places available at the school in any year group, with the exception of sixth form places.

## **11. Equalities**

The local authority's admissions policy and arrangements seek to achieve full compliance with all relevant legislation and guidance, with regard to equal opportunities and human rights (Equality Act 2010, the Human Rights Act 1998, the Welsh Language Act 1993 and the Welsh Language (Wales) Measure 2011).

The local authority wants its services to be accessible to the whole community and will challenge discrimination in our communities, whether it is based on a person's transgender status, race, sex, disability, age, sexual orientation, religion or belief, pregnancy and maternity marriage or civil partnership.

The local authority's Corporate Equality Scheme sets out how the local authority will comply with its Public Sector Equality Duty in the exercise of its functions, having due regard to the need to:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited under the legislation;
- advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and

- foster good relations between persons who share a relevant protected characteristic and persons who do not.

## 12. Data protection and information sharing

The local authority complies with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018. The full [Data Protection guidance and principles](#) of the local authority may be viewed on the website.

Any information recorded by an applicant in a school admission application will be held electronically and used by the local authority for the purpose of processing the application.

The local authority will share the information provided in a school admission application with the relevant school/s in accordance with the [Fair Processing Statement – Education, Early Years and Young People](#).

The local authority will investigate any school admission applications where there is doubt about the information that has been provided. This will be to assist in the prevention and detection of fraud for the purpose of gaining an unfair advantage in the school application system and under Schedule 2, part 1, 2(1) of the Data Protection Act 2018.

## 13. Admissions rounds

### 13.1 Submission of applications

The requirement to apply for a school place

A school admission application **must** be completed by a parent/carer.

A separate application is required for each child.

A child will not be permitted to start at a school until an application has been received and processed by the local authority, and a school place has been offered by the local authority.

#### The applicant

In respect of applications for nursery children and children of statutory school-age, the application must be made by a 'parent' of the child, as defined by Section 576 of the Education Act 1996. This states that a 'parent', in relation to a child or young person, includes any person who is not a biological parent but who has parental responsibility, or who has care of the child.

Therefore, for the purposes of education law, a 'parent' is deemed to include:

- all biological parents, whether they are married or not;
- any person who, although not a biological parent, has parental responsibility for a child or young person - this could be an adoptive parent, a step-parent, guardian or other relative;
- any person who has care of a child or young person but is not a biological parent and does not have parental responsibility.

A person typically has care of a child or young person if they are the person with whom the child lives, either full or part-time and who looks after the child, irrespective of what their biological or legal relationship is with the child.

The local authority uses the term 'parent/carer' throughout this policy to reflect the legal definition of 'parent', as detailed above.

The local authority will only accept an application from a person who is not a parent/carer if it is accompanied by an appropriate written authorisation from a parent/carer.

An applicant will be required to make a declaration of the relationship to the child and provide such information as the local authority requires, including documentation, evidencing that relationship, at the time the admission application is submitted.

The local authority expects that the parents/carers of a child reach agreement about the preferred school/s and who will submit the application, before a school admission application is submitted. The local authority will not intervene in disputes between parents/carers over school applications and will expect that these are resolved privately. If parents/carers cannot agree and a Court order stating who should be making the application and what the school preference/s should be has not been obtained, the local authority will proceed to accept the application from the parent/carer in receipt of Child Benefit for the child.

Applications in respect of Post-16 admissions/transfers can be submitted by a parent/carer or the learner.

### **How to apply**

Applications can be completed online through sign up to 'My Account' on the Bridgend County Borough Council website.

Any parents/carers who do not have access to their own computer/laptop or smart phone, may use the computers available within the libraries in the county borough to sign up to My Account and complete a school admission application. A parent/carer who remains unable to create a My Account and access the relevant online school admission application, may contact the local authority and request a hardcopy school admission application.

If parents/carers permit completion and submission of a school admission application for their child through the My Account of a third party, the My Account holder will be deemed to be submitting the application on behalf of, and with the full authority of, the parents/carers of the child. In these circumstances, the parents/carers will be considered as accepting responsibility for the consequence of any errors or deficiencies in the completion of the application and/or the submission of the application.

**The local authority accepts no responsibility for the non-receipt of an application that is not submitted through the online facility.**

If the local authority's arrangements for submission of admission applications should change before or during the effective dates of this policy, details will be published in the Starting School Prospectus 2027-2028 and on the [local authority's website](#).

#### **Late applications**

An application should be submitted in time for **receipt** by the local authority by the relevant published closing time and date.

The local authority will accept late applications that are received after the relevant published closing date **provided that** the application is received **before** the local authority has commenced its allocation of places in preparation for the admissions offer (this date will be determined by the local authority at the time but will be at least one month before the published offer date for places) **and** the local authority is satisfied as to the parents/carers' reasons for the late application.

Applications in respect of looked-after children and previously looked-after children, or children with a statement of SEN or an IDP that names a specific school, will **not** be treated as late applications regardless of when the application is received.

All other late applications will not be included in the allocation of places that will be notified to applicants on the relevant published offer date.

Late applications that are not included in the allocation of places for offer day will be processed by the local authority after the relevant published offer date and in order of date and time received. Oversubscription criteria will not apply; if a place is available in the preferred school at the time the application is processed, it will be offered. Therefore, late applicants may find that their preferred school is already full, even if the school is their catchment school.

No applications for 2027-2028 admissions rounds that are received by the local authority after 31 August 2027 will be processed. After this date, an in-year admission/transfer application is required and all considerations applicable to in-year admission/transfer applications will be relevant. The local authority does not accept in-year admission/transfer applications received more than two calendar months in advance of the requested start.

date. Consequently, all applications for a Part-time Nursery class in April 2028 that are received after 31 August 2027 will not be processed until the Spring term 2028.

## **13.2 Nursery class admissions rounds**

Nursery education is non-statutory; however, in Wales, children are entitled to a free, part-time, early-years education place from the start of the term following their third birthday. The place can either be at a local authority-maintained school ('LA-maintained'), or within the non-maintained sector with a registered early year's provider.

**This policy applies only to admissions to nursery classes in LA-maintained schools for which the local authority is the admission authority.** Parents/carers who wish to apply for a nursery place at a voluntary aided school must approach that school directly.

Places are part-time for three-year-olds (Nursery Year 1) and full-time for four-year-olds (Nursery Year 2). Although nursery education is non-statutory, the local authority expects all children who are offered a Part-time Nursery place to attend for five half days per school week and all children who are offered a Full-time Nursery place to attend for five full days per school week.

A school admission (nursery) application **must** be completed by the parents/carers of eligible children for admissions to nursery classes in LA-maintained schools.

A child will only be permitted to attend a nursery class if the relevant application has been submitted **and** the local authority has formally offered a place at that school.

Children who are admitted to a Part-time Nursery class **do not have an automatic right to a Full-time Nursery place at the same school.** All parents/carers of children attending a Part-time Nursery class, whether residing within or outside the defined catchment area, must complete a school admission application for a Full-time Nursery place, at the appropriate time, indicating their school preference/s.

Children who are admitted to a Full-time Nursery class **do not have an automatic right to a Reception year place at the same school.** All parents/carers of children attending a Full-time Nursery class, whether residing within or outside the defined catchment area, must complete a school admission application for a Reception place, at the appropriate time, indicating their school preference/s.

As nursery education is non-statutory, parents/carers have **no right of appeal** in respect of decisions on nursery admissions.

## Timetable for nursery admissions 2027-2028

The timetable for nursery admissions is not governed by the School Admissions Code 2013. The local authority's expected timetable for processing applications for nursery admissions for 2027-2028 is as follows:

### **Full-time Nursery class admissions - pupils born between 1 September 2023 and 31 August 2024, starting in a Full-time Nursery class in September 2027:**

Action	Date
Opening date for submission of applications	10am Monday, 4 January 2027
Closing date for receipt of applications by the local authority	4pm Friday, 2 April 2027
Notification to applicants of offer or refusal of places (the 'offer date')	Friday, 28 May 2027

### **Part-time Nursery class admissions - pupils born between 1 September 2024 and 31 December 2024, starting in a Part-time Nursery class in January 2028:**

Action	Date
Opening date for submission of applications	10am Monday, 4 January 2027
Closing date for receipt of applications by the local authority	4pm Friday, 27 August 2027
Notification to applicants of offer or refusal of places	By 29 October 2027

### **Part-time Nursery class admissions - pupils born between 1 January 2025 and 31 March 2025, starting in a Part-Time Nursery class in April 2028:**

Action	Date
Opening date for submission of applications	10am Monday, 4 January 2027
Closing date for receipt of applications by the local authority	4pm Friday, 27 August 2027
Notification to applicants of offer or refusal of places	By 29 October 2027

## Allocation of Full-time Nursery class places in English-medium schools

The local authority will normally only admit up to the equivalent of the school's published admission number when allocating Full-time Nursery places.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from place of ordinary residence to the nearest openly accessible school gate.

#### **Allocation of Full-time Nursery class places in Welsh-medium schools**

The local authority will normally only admit up to the equivalent of the school's published admission number when allocating Full-time Nursery places.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons
3. Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.
4. Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

## Allocation of Part-time Nursery class places in English-medium schools

In determining the number of Part-time Nursery places available for allocation in any school, the local authority will take into account the capacity of the accommodation used for nursery pupils, the published admission number and the number of Full-time Nursery pupils already on roll at the school.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children born between 1 September 2024 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028 or April 2028) who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children born between 1 September 2024 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028 or April 2028) for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children born between 1 September 2024 and 31 December 2024 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028) and whose place of ordinary residence is within the school's defined catchment area.

Where a school is over-subscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.
- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

4. Children born between 1 September 2024 and 31 December 2024 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028) who are not currently ordinarily resident within the school's defined catchment area but whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission application, that the child will be ordinarily resident within

the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

5. Children born between 1 September 2024 and December 2024 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028) whose place of ordinary residence is outside the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

6. Children born between 1 January 2025 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from April 2028) whose place of ordinary residence is within the school's defined catchment area.

Where a school is over-subscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

7. Children born between 1 January 2025 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from April 2028) who are not currently ordinarily resident within the school's defined catchment area but whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission application, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

8. Children born between 1 January 2025 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from April 2028) whose place of ordinary residence is outside the school's defined catchment area.

Where a school is over-subscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

#### [\*\*Allocation of Part-time Nursery class places in Welsh-medium schools\*\*](#)

In determining the number of Part-time Nursery places available for allocation in any school, the local authority will take into account the capacity of the accommodation used for nursery pupils, the published admission number and the number of Full-time Nursery pupils already on roll at the school.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children born between 1 September 2024 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028 or April 2028) who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children born between 1 September 2024 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028 or April 2028) for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children born between 1 September 2024 and 31 December 2024 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028) who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.
4. Children born between 1 September 2024 and 31 December 2024 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from January 2028) on the basis of proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
5. Children born between 1 January 2025 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from April 2028) who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2027-2028.
6. Children born between 1 January 2025 and 31 March 2025 who will attain the age of three in the school year 2027-2028 (these children will be eligible for a Part-time Nursery place from April 2028) on the basis of proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

### **13.3 Primary/infant school admission round (Reception year)**

The relevant age group for the Reception year is 4-5 years.

Every child is required by law to receive full-time education from the beginning of the school term after their fifth birthday. In the Bridgend County Borough, children are normally admitted to the Reception year in the September following their fourth birthday. However, parents/carers have the option of deferring their child's entry to the Reception

year until later in the same school year. The deferment cannot continue beyond the beginning of the term after the child's fifth birthday, nor beyond the school year for which the original admission application was accepted by the local authority. Where the parent/carer wishes to defer the child's entry to the Reception year as detailed, the local authority will hold a place for the child.

An application for a Reception year place must be submitted. **There is no automatic admission to the Reception year at any primary or infant school, regardless of the school at which the child may be attending a nursery class.**

The local authority will co-ordinate admission arrangements for Reception admissions September 2027.

Parents applying for a voluntary-aided school may also complete a supplementary application form for the individual school, if the school wishes to implement this form. This form would be returned directly to the school's governing body along with any required references, documentary evidence and any other information required. Any supporting information received by the local authority will be passed to the relevant voluntary-aided school for the allocation of places in accordance with their over-subscription criteria.

#### [Timetable for Reception year admissions for September 2027](#)

The expected timetable for children born between 1 September 2022 and 31 August 2023, entering a Reception class in September 2027 is as follows:

Action	Date
Opening date for submission of applications	10am Monday, 9 November 2026
Closing date for receipt of applications by the local authority	4pm Friday, 15 January 2027
Notification to applicants of offer or refusal of places (the 'offer date')	Friday, 16 April 2027
Parents to notify the local authority of acceptance or refusal of places offered.	Friday, 30 April 2027
Closing date for parents/carers to submit an appeal	4pm Friday, 14 May 2027

#### [Allocation of Reception year places for September 2027 in English-medium schools](#)

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 1 to Year 6 in respect of primary schools, or Year 1 and Year 2 in respect of infant schools, attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 1 to Year 6 in respect of primary schools, or Year 1 and Year 2 in respect of infant schools, attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Year 1 to Year 6 in respect of primary schools, or Year 1 and Year 2 in respect of infant schools, attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

#### [Allocation of Reception year places for September 2027 in Welsh-medium schools](#)

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children who will have a sibling at the school in any age group from Year 1 to Year 6 attending the school in the school year 2027-2028.
4. Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

#### **13.4 Junior school admission round (Year 3)**

In primary schools, the infant and junior sections are simply departments of the same school and children progress through the school from the infants to juniors without having to transfer elsewhere. Therefore, parents/carers are **not** required to complete a school admission application, since the children are already regarded as registered pupils in the primary school.

Children attending Year 2 in an infant school do not automatically transfer to Year 3 at junior school. An application for a Year 3 place at junior school must be submitted. **There is no automatic admission to a junior school or any primary school regardless of the infant school or primary school that a child currently attends.**

Children normally enter Year 3 in junior school at the beginning of the school year following their seventh birthday.

In Bridgend, there is one junior school, (that is, Llangwydd Junior School), which is an English-medium school.

If parents/carers do not wish their child to attend Year 3 at junior school and instead wish for their child to attend Year 3 at a standard primary school, an in-year admission/transfer application must be submitted. Parents/carers should note that places in Year 3 in a standard primary school may be very limited or unavailable. Also, that the local authority will not make admission decisions in respect of in-year admission/transfer applications for a September 2027 start date until Easter 2027.

#### [\*\*Timetable for Year 3 junior school admissions for September 2027\*\*](#)

The expected timetable for children born between 1 September 2019 and 31 August 2020, moving from infants school (Year 2) to junior school (Year 3) in September 2027 is as follows:

Action	Date
Opening date for submission of applications	10am Monday, 9 November 2026
Closing date for receipt of applications by the local authority	4pm Friday, 15 January 2027
Notification to applicants of offer or refusal of places (the 'offer date')	Friday, 16 April 2027
Closing date for parents/carers to submit an appeal	4pm Friday, 14 May 2027

#### [\*\*Allocation of Year 3 junior school places for September 2027\*\*](#)

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 4 to Year 6 attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 4 to Year 6 attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Year 4 to Year 6 attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

### 13.5 Secondary school admission round (Year 7)

Children normally enter Year 7 in secondary school at the beginning of the school year following their eleventh birthday.

An application for a Year 7 place must be submitted. **There is no automatic admission to any secondary school, regardless of the primary or junior school that a child currently attends.**

In Bridgend, there is one Welsh-medium secondary school (that is, Ysgol Gyfun Gymraeg Llangynwyd). There is one voluntary-aided secondary school (that is, Archbishop McGrath Catholic High School), for which the local authority is **not** the admission authority. All other secondary schools are English-medium.

The local authority will co-ordinate admission arrangements for Year 7 admissions September 2027.

Parents applying for a voluntary-aided school may also complete a supplementary application form for the individual school, if the school wishes to implement this form. This form would be returned directly to the school's governing body along with any required references, documentary evidence and any other information required. Any supporting information received by the local authority will be passed to the relevant voluntary-aided school for the allocation of places in accordance with their over-subscription criteria.

#### Timetable for Year 7 secondary school admissions for September 2027

The expected timetable for children born between 1 September 2015 and 31 August 2016, transferring from junior/primary school (Year 6) to secondary school (Year 7) in September 2027 is as follows:

Action	Date
Opening date for submission of applications	10am Monday, 14 September 2026
Closing date for receipt of applications by the local authority	4pm Saturday, 31 October 2026
Notification to applicants of offer or refusal of places (the 'offer date')	Monday, 1 March 2027

Parents to notify the local authority of acceptance or refusal of places offered.	Monday, 15 March 2027
Closing date for parents/carers to submit an appeal	4pm Monday, 5 April 2027

### Allocation of Year 7 secondary school places for September 2027 for English-medium schools

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.
- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2027-2028.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

#### [\*\*Allocation of Year 7 secondary school places for September 2027 for the Welsh-medium school\*\*](#)

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked-after or previously looked-after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2027-2028.
4. Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

## **14. Explanations of oversubscription criteria**

### **14.1 Looked-after and previously looked-after children**

The local authority is under a duty to prioritise looked-after and previously looked-after children in the oversubscription criteria.

In the case of a looked-after child, the school admission application must be completed and submitted by the corporate parent (that is, the local authority with responsibility for the child) and supporting evidence must be provided (a Care Order or Interim Care Order).

In the case of previously looked-after children, the school admission application must be accompanied by supporting evidence from the former corporate parent.

The relevant supporting evidence must be submitted with the application.

### **14.2 Children in receipt of a statement of special educational needs (SEN) or a local authority-maintained individual development plan (IDP)**

To satisfy this criterion, the child must have a statement of SEN or a local authority-maintained IDP and the application is in respect of a mainstream place at the school named in the statement of SEN or local authority-maintained IDP.

### **14.3 Children for whom a placement is essential for medical, psychological, or compelling social reasons**

To satisfy this criterion:

1. applicants **must** provide supporting written evidence from a relevant professional/s, such as, a registered health professional and/or a social worker, that states the reasons why the preferred school is the most suitable school and what difficulties would arise if the child had to attend another school. The evidence **must** be dated no more than three months prior to the application submission date; **and**
2. that written evidence is accepted by the local authority as sufficient to determine that placement at the preferred school is essential for the child.

**Evidence that purely confirms a child's diagnosis or circumstances does not satisfy this criterion.**

Applications in respect of young carers will be considered under this criterion subject to provision of the necessary evidence, as set out above.

The local authority expects **the applicant** to provide the required written evidence at the time the application is submitted. If this is not possible, the local authority must be advised of and satisfied as to the reasons and the required written evidence must then be provided prior to the closing time and date of the admission round. If the required written evidence is not provided to the local authority before the closing of the admission round, the application will not be considered for prioritisation under this criterion.

#### 14.4 Child's address / place of ordinary residence

Applicants must record the current address at which the child is ordinarily resident on a school admission application.

When considering whether a child lives in a school's catchment area (English-medium schools) or the proximity to the school (Welsh-medium schools), it is the child's place of ordinary residence that the local authority considers to be the home address and satisfying the relevant admissions criteria.

Where the child's parents/carers are not living together but have shared responsibility for the child, and the child lives with each parent/carer for part of the periods during which the child receives education, the child will be considered as being ordinarily resident at the places where **each** of the parents/carers is ordinarily resident. Accordingly, the local authority will accept the address of either parent/carer as being the child's place of ordinary residence.

#### Changes to the child's address / place of ordinary residence

If the child's place of ordinary residence changes after the school admission application has been submitted:

1. The local authority **must** be notified immediately **in writing** (email or letter).
2. If the change is notified to the local authority **before** the closing time and date for the admission round, the change (that is, the new place of ordinary residence) will be used in the application of oversubscription criteria and the allocation of a place.
3. If the change is notified to the local authority **after** the closing time and date for the admission round, the place of ordinary residence recorded on the application (that is, the original place of ordinary residence) will be used in the application of oversubscription criteria and the allocation of a place. The applicant will have the option to complete and submit a late application if the allocated place is at a school that is no longer the preferred school, which would be subject to the provisions relevant to late applications (see section 13.1).
4. If the applicant does not inform the local authority of a change of ordinary residence prior to the date on which the child would start school, the local authority will take the action detailed below under 'provision of false or misleading information'.

## Applications made on the basis of a **future** change in the place of ordinary residence

Where the applicant is in the process of a house move at the time that the application is submitted and is expressing a preference for a school that is the catchment school for the future address (English-medium schools) or the most proximate school for the future address (Welsh-medium schools), the applicant **must** record this on the application form and **must** provide the following evidence to the local authority:

- written evidence from a solicitor that contracts have been exchanged for the purchase of the property and a date for completion of the purchase has been agreed, such that the child will be moving to the new property and be resident at the address by the start of the school term to which the application relates; or
- a written tenancy agreement evidencing that the child will be resident at the new address by the start of the school term to which the application relates.

All required evidence **must** be received by the local authority **prior to the closing time and date for the admission round** and it is the responsibility of the applicant to provide the required evidence to the local authority by that deadline. If the required evidence is not received prior to the closing time and date, the application will be treated as an out of catchment application for the preferred school/s (English-medium schools), or the proximity to the preferred school (Welsh-medium schools) will be measured using the current (original) address.

If the evidence does not confirm that the child will be resident at the new address by the start of the school term to which the application relates, the application will be processed on the basis of the current (original) address.

## Provision of false or misleading information regarding the place of ordinary residence

Every parent/carer who is applying for an admission round place will be expected to record information in the application form and/or supply documentation **with the application form** that evidences the child's place of ordinary residence.

The local authority will check the child's place of ordinary residence against the records held by the child's school (if applicable). In addition, Council Tax records for the parent/s or carer/s will be checked. If the parent/s or carer/s are not registered for Council Tax, documents supplied by the applicant will be checked. If the local authority is not satisfied by any evidence provided by the applicant and there is ongoing doubt about the child's place of ordinary residence, the local authority reserves the right to undertake further checks and/or seek further verification from the applicant. This will be to assist in the prevention and detection of address fraud for the purpose of gaining an unfair advantage in the school application system and under Schedule 2, part 1, 2(1) of the Data Protection Act 2018.

If the local authority concludes that a parent/carer has provided fraudulent or intentionally misleading information relating to the child's place of ordinary residence (this includes the failure to notify the local authority of changes to the place of ordinary residence) in order to obtain the advantage of a particular school placement to which the child would otherwise not be entitled, the local authority will act in accordance with paragraphs 3.40 and 3.41 of the School Admissions Code 2013.

If the local authority withdraws a school place, a new application will be required based on the accurate place of ordinary residence, and a right of appeal will be offered if a place at the preferred school/s is refused.

## 14.5 Siblings

A sibling is classified as a half or full brother/sister, a step-brother/sister, an adopted brother/sister, or a child living in the same household.

An application will be considered under the sibling criterion if the following conditions are met:

1. the full sibling details are recorded on the application; and
2. the sibling and the child who is the subject of the application **will be attending the same school at the same time** and the sibling is of statutory school-age.

This means:

- for Reception year applications, the sibling must be Year 1 to Year 6 in the school year for which the application is being made;

- for Year 3 junior school applications, the sibling must be in Year 4 to Year 6 in the school year for which the application is being made;
- for Year 7 secondary school applications, the sibling must be in Year 8 to Year 11 in the school year for which the application is being made;
- for Full-time Nursery and Part-time Nursery applications, the sibling must be Reception year to Year 6 in the school year for which the application is being made. As there is significant similarity in the timetables for the Reception, Full-time Nursery and Part-time Nursery admissions rounds, a parent/carer may not have been notified of the outcome of a Reception application for a child when completing a Full-time or Part-time Nursery application for another child. The parent/carer will be able to record the details of the child for whom a Reception application has been submitted but the sibling criterion will not be met if the local authority does not subsequently offer a Reception place at the relevant school to the sibling.

#### **Provision of false or misleading sibling information**

The local authority reserves the right to undertake checks on any sibling information provided. This will be to assist in the prevention and detection of fraud for the purpose of gaining an unfair advantage in the school application system and under Schedule 2, part 1, 2(1) of the Data Protection Act 2018.

If the local authority concludes that a parent/carer has provided fraudulent or intentionally misleading information relating to the sibling criterion in order to obtain the advantage of a particular school placement to which the child would otherwise not be entitled, the local authority will act in accordance with paragraphs 3.40 and 3.41 of the School Admissions Code 2013.

If the local authority withdraws a school place, a new application will be required based on the accurate information, and a right of appeal will be offered if a place at the preferred school/s is refused.

#### **14.6 Multiple birth children**

A multiple birth is defined as the birth of more than one baby from a single pregnancy (for example, the birth of twins).

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other multiple birth child/ren for whom an application was received at the same time and for the same school/s.

#### **14.7 Proximity to school**

The distance measurement will be from the child's place of ordinary residence to the nearest openly accessible school gate through which pupils may enter the school grounds.

It will be for the local authority to determine whether any entrance at any school does or does not constitute an openly accessible school gate.

In respect of residences that are within blocks of flats, the distance will be calculated from the front entrance of each flat.

The distances will be calculated to four decimal places.

The local authority uses software to measure all distances within the Bridgend County Borough that takes into account the assessed, available walking routes to the school/s. The local authority will not take into account any other walking routes to a school that a parent/carer may choose to use.

For applications where the child's place of ordinary residence is outside the Bridgend County Borough, the distance will be measured using publicly available web-based services.

## 15. The offer process for admissions rounds

### 15.1 Offer dates

The School Admissions Code 2013 sets out how admission authorities in Wales must identify the offer date for primary school (Reception), junior school (Year 3) and secondary school (Year 7) admissions rounds, reflecting The School Admissions (Common Offer Date) (Wales) Regulations 2013. The relevant offer dates for all admissions rounds for 2027-2028 are detailed in section 13.

### 15.2 Communication of the outcome

Parents/carers who submit an application by the published closing time and date of an admission round, or parents/carers whose late application has been accepted by the local authority for inclusion in the allocation of places for the offer date, will be notified in writing of the outcome of their application.

Parents/carers may not expect that the outcome of their application will be communicated verbally.

If the application is refused, the notification will set out the reasons for the decision and will advise parents/carers on the appeal process. As nursery education is non-statutory, **parents/carers have no right of appeal in respect of unsuccessful nursery class applications.**

### 15.3 Waiting lists

The local authority maintains waiting lists for oversubscribed schools. If a place at the preferred school is not offered, the child will be automatically included in the waiting list for

the school unless the parent/carer expressly advises the local authority that this action is not required.

For the **admissions rounds**, children will remain on the waiting list, for any school at which they have been refused a place, until 30 September 2027. Children will automatically be removed from the waiting list/s after this date.

If additional places become available at a school, they will be allocated to children on the waiting list on the basis of the published oversubscription criteria (see sections 13 and 14) and not the length of time a child has been on the waiting list.

## 16. In-year admissions / transfers

### 16.1 Circumstances in which an in-year admission/transfer application is required

An in-year admission/transfer application **must** be completed in any of the following circumstances:

1. If a child moves into Bridgend County Borough during the course of an school year and the parents/carers wish the child to attend a school for which the local authority is the admission authority.
2. If the parents/carers wish their child/ren to move to a different school within the Bridgend County Borough during the course of a school year and the parents/carers wish the child to move to a school for which the local authority is the admission authority.
3. If an application for an admission round has not been completed and submitted to the local authority by 31 August 2027 (that is, an application is being submitted on or after the official start date of the 2027-2028 school year).

### 16.2 School transfers

Parents/carers who wish to apply for a place at a different school for reasons other than a change of ordinary residence are advised to carefully consider the information in the Starting School Prospectus 2027-2028 and [information available on the local authority's website](#).

Parents/carers should talk to the headteacher of the pupil's current school about the reasons for a change of school being considered. There is a significant amount of research evidencing that changing schools is disruptive and can have a negative impact on a pupil's attainment. There are many reasons for this. It is particularly important that careful consideration is given to the impacts of moving pupils in Year 10 and Year 11, who would have already begun to study for their chosen GCSE subjects, as those GCSE subjects may not be available at a different school.

### 16.3 ‘Advance’ requests

It is not fair and equitable for the local authority to hold places open for children for undue periods of time. Accordingly, the local authority will only process an ‘advance’ in-year school admission/transfer application (that is, for a future admission date), where the requested future admission date is **within two calendar months of the date the application is received** by the local authority, **and** the local authority is satisfied as to the reasons for the advance request.

### 16.4 Availability of places

Section 4 provides information regarding school capacities and published admission numbers, which the local authority uses to determine whether places are available.

As the number of pupils on roll in any school can change on a frequent basis, the local authority will not provide information on the availability of places in any year group at any school in advance of an in-year school admission/transfer application being submitted.

### 16.5 Consideration of applications

In-year school admission/transfer applications are considered by the local authority in order of date and time received. However, the local authority reserves the right to process any individual application in a different order where it considers this to be necessary and justified by the specific circumstances.

For in-year admissions/transfers, whether the child lives in or out of the catchment area of the requested school (English-medium schools) or the proximity to the nearest school (Welsh-medium schools), is of no relevance to the local authority’s decision on whether a place at the requested school can be offered. (However, it is of relevance to the determination of whether there is eligibility or not for the provision of free home-to-school transport.)

If there is no place available in the relevant year group at the requested school, the local authority child will refuse admission to that school unless the circumstances are such that the local authority considers an exception should be made.

### 16.6 Communication of the outcome

Applicants will be notified in writing of the outcome of their in-year school admission/transfer application within 15 school days or 28 calendar days of the date of the application being received, whichever is the sooner.

Parents/carers may not expect that the outcome of their application will be communicated verbally.

If the application is refused, the notification will set out the reasons for the decision and will advise parents/carers on the appeal process. As nursery education is non-statutory,

**parents/carers have no right of appeal in respect of unsuccessful nursery class applications.**

### **16.7 Offer of a place at an alternative school**

If a place at the preferred school is refused, the local authority will either offer a place at the nearest alternative school that has an available place in the relevant year, or explain why such an offer cannot be made (for example, where the nearest alternative school is the child's current school). The offer of a place at the nearest alternative school will be open for 21 calendar days from the date of the local authority's letter and will automatically expire if not accepted within that period.

If the offer of a place at the nearest alternative school is not accepted, or is expressly refused, the parent/carer must submit a new application if seeking a place at any other preferred school.

### **16.8 Waiting lists**

The local authority maintains waiting lists for oversubscribed schools. If a place at the preferred school is not offered, the child will be automatically included in the waiting list for the school unless the parent/carer expressly advises the local authority that this action is not required.

For all in-year admission/transfer applications, children will remain on the waiting list for any school at which they have been refused for a period of three months from the date of the refusal letter, or until 31 August 2028, whichever is the sooner. Children will automatically be removed from the waiting list/s after this period or date.

Submission of a new in-year admission/transfer application for the same school does not renew a child's place on a waiting list. If a new in-year admission/transfer application is submitted and is refused, the child will be recorded as a new entry to the waiting list from the date of the refusal letter.

Registration of an admission appeal does not extend a child's time on the waiting list, irrespective of the date for the admission appeal hearing.

If additional places become available at a school, they will be allocated to children on the waiting list on the basis of the published oversubscription criteria (see sections 13 and 14) and not the length of time a child has been on the waiting list. A place cannot be allocated to a child who is not on the waiting list.

## 17. Admission appeals

### 17.1 General

School admission appeals are conducted in accordance with Welsh Government's School Admission Appeals Code 2013.

Any person who is considering an appeal is strongly recommended to read this School Admissions Policy 2027-2028, the School Admissions Code 2013 and the School Admission Appeals Code 2013 in full.

In the vast majority of cases, children are offered places in line with the expressed preference for a specific school. If, however, a child is unable to gain admission to the preferred school, parents/carers or Post-16 learners may choose to appeal to an independent appeal panel.

Parents/carers/ or Post-16 learners may accept a place offered at an alternative school while pursuing a place at the preferred school. The independent appeal panel will consider the grounds put forward by appellant/s and determine whether the merits of the case outweigh the case presented by the local authority.

As nursery education is non-statutory, parents/carers have **no right of appeal** in respect of decisions on nursery class admissions.

### 17.2 Registering an appeal

#### Persons who may register an appeal

In respect of appeal registrations for children of statutory school-age, the appeal must be registered by the parent/carer, as defined in section 13.

The local authority will only accept an appeal registration from a person who is not a parent/carer if it is accompanied by an appropriate written authorisation from a parent/carer.

The person registering the appeal will be required to make a declaration of the relationship to the child and provide such information as the local authority requires, including documentation, evidencing that relationship, at the time the appeal registration is submitted. The person registering the appeal will not be required to submit such if it has already been submitted in support of the admission application.

Appeals in respect of Post-16 admissions/transfers can be registered by either a parent/carer or the learner.

#### Timescale for registering an appeal

In the case of appeals relating to the refusal of places in an admissions round, the appeal **must** be registered with the local authority by the closing date as detailed in section 13.

In the case of appeals relating to the refusal of a place following submission of an in-year admission/transfer application, the appeal **must** be registered with the local authority within 21 calendar days of the date of the written notification of the refusal.

### How to register an appeal

An appeal must be registered in writing.

The notification letter from the local authority regarding the outcome of an admission application will provide information on the appeal registration process.

### 17.3 Arrangements for the appeal hearing

The local authority will refer the appeal to an independent appeal panel. The clerk to the panel will arrange a time and place for the hearing.

Appellants will have the opportunity of attending the panel hearing and making their representations (oral and/or written).

Appellants are advised that:

1. They may elect not to attend the appeal meeting and, instead, allow the appeal to be considered on a written statement.
2. The appeal will be decided on the information available if parents/carers have indicated an intention to attend the appeal but do not do so, and fail to provide a reasonable explanation.
3. If appellants cannot attend on the scheduled date and it is not reasonably practicable to offer an adjourned hearing, the appeal will be decided on the information available.
4. Appellants will be given at least 14 calendar days written notice of the meeting of the appeal panel, unless they agree to a shorter period. The appellant should confirm this in writing to the clerk to the panel.

Appellants may be accompanied at a panel hearing by a friend or adviser or an interpreter. In accordance with the School Admission Appeals Code 2013, members of the Council, Members of the Senedd, local politicians and local authority officers are not permitted to attend. Appellants are requested to inform the clerk to the independent appeal panel of any representation at least seven days before the hearing.

### 17.4 Repeat appeals

Parents/carers and Post-16 learners do not have a right to a second appeal in respect of the same school and the same school year except where:

- there were faults in the first appeal process and there is a significant possibility that the outcome might have been affected by the faults (this may be on the recommendation of the Public Services Ombudsman for Wales); or
- a fresh application is accepted because there has been a significant and material change in the circumstances of the parent/carer or child and that application has also been refused. Common examples of where a fresh application is considered are where a family has moved address or there are new medical reasons pertaining to the choice of school.

Parents/carers and Post-16 learners who appeal unsuccessfully may re-apply for a place at the same school in respect of a later school year (but subject to the timescales set out in section 13). Parents/carers and Post-16 learners will have a right to appeal if that application is refused.

Any information provided by an appellant associated with a school admission appeal registration will be held electronically and used by local authority for the purpose of the admission request.

## 18. The Bridgend Admission Forum

The local authority is under a statutory duty to establish an admission forum.

The Bridgend Admission Forum is constituted in accordance with Annex D of the statutory School Admissions Code 2013.

The role of the forum is to help ensure that the school admissions system in Bridgend is fair, straightforward and easy for parents/carers to understand. The forum is responsible for monitoring the local authority's compliance with the statutory School Admissions Code 2013 and may advise the local authority on ways in which admission arrangements could be improved.

The terms of reference, meeting minutes and annual reports of the [Bridgend Admission Forum](#) are published on the local authority's website.

## 19. Additional information

In addition to the sources of information already detailed, the local authority's Starting School Prospectus for 2027-2028 provides additional information on matters associated with school admissions and starting school.

## 20. Queries

Queries in relation to this policy and the admissions or appeal registration processes may be directed to Pupil Services as follows:

E-mail: [pupilservices@bridgend.gov.uk](mailto:pupilservices@bridgend.gov.uk)

Tel No: 01656 642622

Address: Bridgend County Borough Council  
Education, Early Years and Young People  
Pupil Services  
Civic Offices  
Angel Street  
Bridgend  
CF31 4WB

[This policy](#) is published on the Bridgend County Borough Council website.

Cyngor Bwrdeistref Sirol



# **Co-ordinated School Admission Arrangements 2028-2029**

(1 September 2028 – 31 August 2029)



## 1. Introduction

The Education (Co-ordination of School Admission Arrangements and Miscellaneous Amendments) (Wales) Regulations 2024, requires local authorities to formulate and publish a scheme to co-ordinate admission arrangements for all maintained schools, (except school sixth-form places, maintained special schools and maintained nursery schools, but including boarding schools) within their area.

The entry of children to schools is controlled and administered by an 'admission authority'. In the case of co-ordinated school admissions in Bridgend, Bridgend County Borough Council (also referred to in this document as 'the local authority') will administer the co-ordinated school admission arrangements.

Appendix A identifies each school to which the co-ordinated scheme applies and whether the local authority, or the governing body, is the admission authority.

In accordance with the Education (Relevant Areas for Consultation on Admission Arrangements) Regulations 1999, the relevant area for the admission authority, is the geographical area of the County Borough of Bridgend.

Co-ordinated schemes are intended to simplify the admissions process for parents/carers whilst reducing the likelihood of any child being left without a school place. Co-ordination establishes a mechanism that ensures that, as far as is reasonably practicable, every parent/carer of a child living in a local authority area, who submits an application within the normal admissions round, is sent one, and only one, offer of a school place by their local authority.

The local authority is unable to support applications to schools not in the geographical area of Bridgend.

**The local authority continuously reviews and reserves the right to amend its admissions procedures for statutory and non-statutory education.**

The Education (Co-ordination of School Admission Arrangements and Miscellaneous Amendments) (Wales) Regulations 2024 state that each year all local authorities must formulate and adopt a co-ordinated scheme by 1 January in the relevant determination year.

Where the scheme is substantially different from the scheme adopted for the previous school year, the local authority must consult the other admission authorities in the area and any other local authority it determines appropriate to consult with.

Where the scheme has not changed from the previous year, there is no requirement to consult, subject to the requirement that the local authority must consult on the scheme at least once every six years, even if there have been no changes during that period.

A local authority must inform the Welsh Ministers, whether they have secured the adoption of a qualifying scheme by 28 February in the determination year. A co-ordinated scheme may be imposed by Welsh Ministers where a local authority has not notified the Welsh Ministers by 28 February each determination year, whether or not a scheme has been adopted.

All admission authorities must participate in the co-ordination of the normal admission round and provide the local authority with the information it needs to co-ordinate admissions by the dates agreed within the scheme.

## **2. Administration of the co-ordinated scheme**

The local authority will co-ordinated admission arrangements for applications in the normal admission rounds, that is, Reception and Year 7.

Parents will need to complete an online ‘Common Application Form’ and can express up to three preferences for community and/or voluntary-aided schools.

The local authority and the admission authorities for the voluntary-aided schools will exchange information on applications made, ranking of preferences and confirmation of offers by the dates specified in the admission round timetables.

Offers of places must be sent by the local authority on the national offer day. For secondary school admissions, this is 1 March or the next working day, and for primary schools, this is 16 April or the next working day. Parents/carers will be notified in writing of the outcome of their application.

If a preference is declined, parents/carers will be offered the right of appeal. How the appeal is processed will depend on the type of school that has been declined. Full details of how to submit an appeal will be included within the response letter to the parent/carer.

### **2.1 Participants in the scheme**

The local authority is the admission authority for maintained community schools (see Appendix 1). The following schools are voluntary-aided and are their own admission authority:

- Archdeacon John Lewis Church in Wales Primary School
- St Mary’s Catholic Primary School
- St Mary’s and St Patrick’s Catholic Primary School
- St Robert’s Catholic Primary School
- Archbishop McGrath Catholic High School

## **3. Parental preference**

### **3.1 The duty to comply with parental preference**

In relation to admissions to primary schools (excluding nursery classes), junior schools and secondary schools (excluding sixth forms), the local authority has a statutory duty to have regard to the general principle that pupils are to be educated in accordance with the wishes of their parents/carers, so far as that would be compatible with the provision of efficient education and the avoidance of unreasonable public expenditure (S.9 Education Act 1996).

The local authority applies the same principle of parental preference to applications for non-statutory, nursery education, in a local authority-maintained school.

The duty of the local authority to comply with parental preference does not apply where:

1. To admit would be incompatible with the statutory duty to meet infant class size regulations.
2. To admit the child would prejudice the provision of efficient education or efficient use of resources.
3. Where arrangements for entry to a school's sixth form are based wholly on selection by reference to ability or aptitude and compliance with the preference, would be incompatible with selection under those arrangements.
4. The child has been permanently excluded from two or more schools. Where this is the case, the local authority is not required to comply with parental preference for a school place for a period of two years from the first school day of the second exclusion.

This disapplication from the requirement to comply with parental preference does not apply to:

- Pupils who were below compulsory school age when they were excluded.
- Pupils who were reinstated after permanent exclusion, or pupils who would have been reinstated following a permanent exclusion, had it been practicable to do so.
- Pupils with statements of special educational need or an individual development plans (IDP).
- Pupils who are looked after (the application for admission must be made by the corporate parent), or previously looked after children (the application for admission must be accompanied by evidence of the previously looked after status).

### **3.2 Compliance with parental preference**

Within the local authority, each English-medium school has an area it serves (its catchment area). For Welsh-medium schools and faith (voluntary-aided schools), there are no catchment areas. However, the local authority must allow all parents/carers the opportunity to express a preference for the school they wish their child to attend regardless of catchment area. While most parents/carers are happy to choose their catchment area school, there is no requirement for that school to be selected by parents/carers on a school admission or in-year school admission/transfer application. The application allows parents/carers to list more than one school in order of preference. The local authority will offer a place at the highest available preferred school.

The local authority is committed to the principle of providing local schools for local children and will make every effort to ensure that parents/carers are able to secure a place for their child/ren at the catchment school, where parents/carers have expressed a preference for that school. However, parents/carers must not automatically assume that a place will be available for their child at their catchment school, or any other school they may wish to apply for.

The local authority will meet the preferences for admission expressed by parents/carers ahead of those who have expressed no preference. Consequently, for the admission rounds, parents/carers must ensure they record their preference/s on the school admission application and that the application is submitted to the local authority by the stated deadline.

### **3.3 Changes to an expressed parental preference**

For admission rounds, if the parent/carer wishes to make a change to the school preference/s after the application has been submitted to the local authority:

1. The change must be notified to the local authority **in writing** (email or letter).
2. If the change is notified to the local authority **before** the published closing date for the admission round, the change will be taken into consideration in the application of oversubscription criteria and the allocation of places.
3. If the change is notified to the local authority **after** the closing date for the admission round, the school preference/s recorded on the application will be used in the application of oversubscription criteria and the allocation of places. The parent/carer will have the option to complete and submit a late application if the allocated place is at a school that is no longer the preferred school, which would be subject to the provisions relevant to late applications (see section 9.2). However, in these circumstances, the local authority will offer the applicant the option instead, to maintain the original application and school preference/s.

The admission application form will indicate the maximum number of school preferences that a parent/carer can express. A parent/carer may choose to express a lesser number of school preferences. However, in such a situation, if the local authority cannot offer a place at any preferred school, the local authority will take no further action in respect of the application. The parent/carer will be required to complete and submit a new application for any alternative school, which will be processed as a late application in accordance with the provisions of section 9.2.

## **4. School catchment areas**

### **4.1 Welsh-medium schools**

There are no catchment areas for the Welsh-medium schools within Bridgend.

### **4.2 Voluntary-aided schools**

There are no catchment areas for the voluntary-aided schools within Bridgend.

### **4.3 All other schools**

[School catchment area maps](#) are published on the local authority's website.

Catchment areas are subject to change, with any changes being subject to consultation prior to implementation.

**There is no right to, or guarantee of, an offer of a place at a child's catchment area school.**

## **5. School capacity and published admission number**

The capacity of a school is the number of pupil places it contains.

Welsh Government has published a capacity calculation methodology for all schools. This aims to provide a robust and consistent method of assessing the pupil capacity of all community, voluntary-aided, voluntary controlled and foundation schools in Wales.

A school's calculated capacity is based on existing accommodation at a school and its usage. For statutory-age year groups (Reception to Year 11) the calculated capacity informs the published admission number for a school.

Appendix B provides the published admission numbers for all schools for which the local authority is the admission authority.

For a normal year of entry (that is, Reception and Year 7), the local authority will admit pupils up to the published admission number.

As the published admission number reflects the school's ability to accommodate pupils, the local authority will only exceed the published admission number in exceptional circumstances.

## **6. Information or circumstances that the local authority does not consider when making admission decisions**

The following is not an exhaustive list, but details the principal information and circumstances that have no bearing on admission decisions:

- Any school that the child has previously attended.
- Any particular school that the child might attend in the future.
- A parent/carer communicating to any school that there is an intention to apply for a place at the school. This would include any instance when a parent/carer believes that they have 'registered' their child's name for a place at the school.
- An invitation to, or attendance by a child, at a 'taster'/transition day at any school.
- Allowance by any school of a visit by the parents/carers and/or child.
- Any indication, either explicitly given or assumed by a parent/carer to have been given by a school, that there are places available at the school in any year group, with the exception of sixth-form places.

## **7. Equalities**

The local authority's School Admissions Policy and arrangements seeks to achieve full compliance with all relevant legislation and guidance, with regard to equal opportunities

and human rights (Equality Act 2010, the Human Rights Act 1998, the Welsh Language Act 1993 and the Welsh Language (Wales) Measure 2011).

The local authority wants its services to be accessible to the whole community and will challenge discrimination in our communities, whether it is based on a person's gender status, race, sex, disability, age, sexual orientation, religion or belief, pregnancy and maternity marriage or civil partnership.

The local authority's Corporate Equality Scheme sets out how the local authority will comply with its Public Sector Equality Duty in exercising its functions, having due regard to the need to:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited under the legislation;
- advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and
- foster good relations between persons who share a relevant protected characteristic and persons who do not.

## **8. Data protection and information sharing**

The local authority complies with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018. The full [Data Protection guidance and principles](#) of the local authority may be viewed on the website.

Any information recorded by an applicant in a school admission application will be held electronically and used by the local authority for the purpose of processing the application.

The local authority will share the information provided in a school admission application with the relevant school/s in accordance with [fair processing](#).

The local authority will investigate any school admission applications where there is doubt about the information that has been provided. This will be to assist in the prevention and detection of fraud for the purpose of gaining an unfair advantage in the school application system and under Schedule 2, part 1, 2(1) of the Data Protection Act 2018.

## **9. Admissions rounds**

### **9.1 Submission of applications**

There is a requirement for parents/carers to apply for a school place for their child.

A school admission application **must** be completed by a parent/carer.

A separate application is required for each child.

A child will not be permitted to start at a school until an application has been received and processed by the local authority, and a school place has been offered by the local authority to the parent/carer in writing.

### **The applicant**

In respect of admission applications, the application must be made by a 'parent' of the child, as defined by section 576 of the Education Act 1996. This states that a 'parent', in relation to a child or young person, includes any person who is not a biological parent but who has parental responsibility, or who has care of the child.

Therefore, for the purposes of education law, a 'parent' is deemed to include:

- all biological parents, whether they are married or not;
- any person who, although not a biological parent, has parental responsibility for a child or young person - this could be an adoptive parent, a step-parent, guardian or other relative; and
- any person who has care of a child or young person, but is not a biological parent and does not have parental responsibility.

A person typically has care of a child or young person if they are the person with whom the child lives, either full or part-time and who looks after the child, irrespective of what their biological or legal relationship is with the child.

The local authority uses the term 'parent/carer' to reflect the legal definition of 'parent', as detailed above.

The local authority will only accept an application from a person who is not a parent/carer if it is accompanied by an appropriate written authorisation from a parent/carer.

An applicant will be required to make a declaration of the relationship to the child and provide such information as the local authority requires, including documentation, evidencing that relationship, at the time the admission application is submitted.

### **How to apply**

Applications can be completed online through sign up to 'My Account' on the Bridgend County Borough Council website.

Any parents/carers who do not have access to their own computer/laptop or smart phone, may use the computers available within the libraries in the county borough to sign up to My Account and complete a school admission application. A parent/carer who remains unable to create a My Account and access the relevant online school admission application, may contact the local authority and request a hardcopy school admission application.

If parents/carers permit completion and submission of a school admission application for their child through the My Account of a third party, the My Account holder will be deemed to be submitting the application on behalf of, and with the full authority of, the parents/carers of the child. In these circumstances, the parents/carers will be considered

as accepting responsibility for the consequence of any errors or deficiencies in the completion of the application and/or the submission of the application.

**The local authority accepts no responsibility for the non-receipt of an application that is not submitted through the online facility.**

If the local authority's procedures for the submission of admission applications changes before or during the effective dates of these co-ordinated arrangements, details will be published in the Starting School Prospectus 2028-2029 and on the [local authority's website](#).

## 9.2 Late applications

An application should be submitted in time for **receipt** by the local authority by the published closing time and date.

Late applications can be submitted, up to 31 August 2028, online through 'My Account' on the Bridgend County Borough Council website.

Late applications will be processed by the local authority after the relevant published offer date and in order of date and time received. Oversubscription criteria will not apply if a place is available in the preferred school at the time the application is processed as it will be offered. Late applicants may find that their preferred school is already full, even if the school is their catchment school.

## 9.3 Primary/infant school admission round (Reception)

The relevant age group for the Reception year is 4-5 years.

Every child is required by law to receive full-time education from the beginning of the school term after their fifth birthday. In Bridgend, children are normally admitted to the Reception year in the September following their fourth birthday. However, parents/carers have the option of deferring their child's entry to the Reception year until later in the same school year. The deferment cannot continue beyond the beginning of the term after the child's fifth birthday, nor beyond the school year for which the original admission application was accepted by the local authority. Where the parent/carer wishes to defer the child's entry to the Reception year as detailed, the local authority will hold a place for the child.

An application for a Reception year place **must** be submitted. **There is no automatic admission to the Reception year at any primary or infant school, regardless of the school at which the child may be attending a nursery class.**

The co-ordinated school admission arrangements for Reception include all community primary schools and the following voluntary-aided primary schools:

- Archdeacon John Lewis Church in Wales Primary School
- St Mary's Catholic Primary School

- St Mary's and St Patrick's Catholic Primary School
- St Robert's Catholic Primary School

Parents will need to complete an online 'Common Application Form' and can express up to three preferences for community and/or voluntary-aided schools.

Parents applying for a voluntary-aided school may also complete a supplementary application form for the individual school (if the school wishes to implement this form). This form would be returned directly to the school's governing body along with any required references, documentary evidence and any other information required. Any supporting information received by the local authority will be passed to the relevant voluntary-aided school for the allocation of places in accordance with their over-subscription criteria.

### Timetable for Reception admissions for September 2028

The expected timetable for children born between 1 September 2023 and 31 August 2024, entering a Reception class in September 2028 is as follows:

Action	Date
Opening date for submission of applications.	10am Monday 8 November 2027
Closing date for receipt of applications.	4pm Saturday 15 January 2028
The local authority will forward details of all applications received for voluntary-aided schools to the relevant school in order that they may apply the oversubscription criteria within the school's admission arrangements.	Friday 11 February 2028
Voluntary-aided schools to notify the local authority of a ranked list of applicants as per the oversubscription criteria in their admission policies.	Friday 10 March 2028
The local authority will inform other local authorities of the number of applications processed from residents within their area.	Friday 24 March 2028
Notification to be sent by the local authority to applicants of offer or refusal of places (that is, the 'offer date').	Monday 17 April 2028
	Monday 1 May 2028

Notification by parents, within 14 calendar days, to the local authority of acceptance or refusal of places offered.	
Closing date for parents/carers to submit an appeal.	4pm Monday 15 May 2028

#### 9.4 Secondary school admission round (Year 7)

Children normally enter Year 7 in secondary school at the beginning of the school year following their eleventh birthday.

An application for a Year 7 place **must** be submitted. **There is no automatic admission to any secondary school, regardless of the primary or junior school that a child currently attends.**

In Bridgend, there is one Welsh-medium secondary school (that is, Ysgol Gyfun Gymraeg Llangynwyd). There is one faith secondary school (that is, Archbishop McGrath Catholic High School). All other secondary schools are English-medium.

Parents will need to complete an online 'Common Application Form' and can express up to three preferences for community and/or voluntary-aided schools.

Parents applying for a voluntary-aided school may also complete a supplementary application form for the individual school, if the school wishes to implement this form. This form would be returned directly to the school's governing body along with any required references, documentary evidence and any other information required. Any supporting information received by the local authority will be passed to the relevant voluntary-aided school for the allocation of places in accordance with their over-subscription criteria.

#### Timetable for Year 7 secondary school admissions for September 2028

The expected timetable for children born between 1 September 2016 and 31 August 2017, transferring from junior/primary school (Year 6) to secondary school (Year 7) in September 2028 is as follows:

Action	Date
Opening date for submission of applications.	10am Monday 13 September 2027
Closing date for receipt of applications.	4pm Sunday 31 October 2027
The local authority will forward details of all applications received for voluntary-aided schools to the relevant school in order that they may apply the oversubscription criteria within the school's admission arrangements.	Friday 26 November 2027
Voluntary-aided schools to notify the local authority of a ranked list of applicants as per the	Monday 17 January 2028

oversubscription criteria in their admission policies.	
The local authority will inform other local authorities of the number of applications processed from residents within their area.	Friday 4 February 2028
Notification to be sent by the local authority to applicants of offer or refusal of places (that is, the 'offer date').	Wednesday 1 March 2028
Notification by parents, within 14 calendar days, to the local authority of acceptance or refusal of place offered.	Wednesday 15 March 2028
Closing date for parents/carers to submit an appeal.	4pm Wednesday 29 March 2028

## 10. The offer process for co-ordinated admissions rounds

### 10.1 Offer dates

The School Admissions Code 2013 sets out how admission authorities in Wales must identify the offer date for primary school (Reception) and secondary school (Year 7) admissions rounds, reflecting The School Admissions (Common Offer Date) (Wales) Regulations 2013. The relevant offer dates for all admissions rounds for 2028-2029 are detailed in section 9.

### 10.2 Communication of the outcome

Parents/carers who submit an application by the published closing time and date of an admission round, or parents/carers whose late application has been accepted by the local authority for inclusion in the allocation of places for the offer date, will be notified by the local authority, in writing of the outcome of their application.

Parents/carers may not expect that the outcome of their application will be communicated verbally.

If the application is refused, the notification will set out the reasons for the decision and will advise parents/carers of the appeal process.

Where applications have been received from parents/carers from another local authority, the local authority will notify that local authority of the number of applications processed only and the number of successful applications. No personal information will be automatically shared.

### 10.3 Acceptance of offer by parents/carers

Parents/carers who have received an offer of a place on the offer day, must confirm with the local authority acceptance of the place within two weeks after the offer date.

## 10.4 Waiting lists

The local authority will maintain waiting lists for all schools where there was oversubscription to that school. Voluntary-aided schools will notify the local authority when places become available. The local authority will notify the parent/carer of the offer of an available place by letter.

If a place at the preferred school is not offered, the child will be automatically included in the waiting list for the school unless the parent/carer expressly advises the local authority that this action is not required.

For the **admission rounds**, children will remain on the waiting list, for any school at which they have been refused a place, until 30 September 2028. Children will automatically be removed from the waiting list/s after this date.

If additional places become available at a school, they will be allocated to children on the waiting list on the basis of the published oversubscription criteria and **not** the length of time a child has been on the waiting list.

## 11. In-year admissions / transfers

The co-ordinated school admission arrangements do not apply to in-year admissions / transfer applications.

## 12. The Bridgend Admission Forum

The local authority is under a statutory duty to establish an admission forum.

The Bridgend Admission Forum is constituted in accordance with Annex D of the statutory School Admissions Code 2013.

The role of the forum is to help ensure that the school admissions system in Bridgend is fair, straightforward and easy for parents/carers to understand. The forum is responsible for monitoring the local authority's compliance with the statutory School Admissions Code 2013 and may advise the local authority on ways in which admission arrangements could be improved.

The terms of reference, meeting minutes and annual reports of the [Bridgend Admission Forum](#) are published on the local authority's website.

## 13. Additional information

In addition to the sources of information already detailed, the local authority's Starting School Prospectus for 2028-2029 provides additional information on matters associated with school admissions and starting school.

## 14. Queries

Queries in relation to these arrangements and the admissions registration processes may be directed to Pupil Services as follows:

E-mail: [pupilservices@bridgend.gov.uk](mailto:pupilservices@bridgend.gov.uk)

Tel No: 01656 642622

Address: Bridgend County Borough Council  
Education, Early Years and Young People Directorate  
Pupil Services  
Civic Offices  
Angel Street  
Bridgend  
CF31 4WB

These [arrangements](#) are published on Bridgend County Borough Council's website.

## Appendix A - Admission Authority

School	Admission authority
<b>English-medium primary schools</b>	
Abercerdin Primary School	Local authority
Afon y Felin Primary School	Local authority
Betws Primary School	Local authority
Blaengarw Primary School	Local authority
Brackla Primary School	Local authority
Bryncethin Primary School	Local authority
Brynmenyn Primary School	Local authority
Bryntirion Infant School	Local authority
Caerau Primary School	Local authority
Cefn Cribwr Primary School	Local authority
Cefn Glas Infant School	Local authority
Coety Primary School	Local authority
Corneli Primary School	Local authority
Coychurch (Llangrallo) Primary School	Local authority
Croesty Primary School	Local authority
Cwmfelin Primary School	Local authority
Ffaldau Primary School	Local authority
Garth Primary School	Local authority
Litchard Primary School	Local authority
Llangowydd Junior School	Local authority
Llangynwyd Primary School	Local authority
Maes yr Haul Primary School	Local authority
Mynydd Cynffig Primary School	Local authority
Nantyffyllon Primary School	Local authority
Nantymoel Primary School	Local authority
Newton Primary School	Local authority
Nottage Primary School	Local authority
Ogmore Vale Primary School	Local authority
Oldcastle Primary School	Local authority
Pencoed Primary School	Local authority
Penybont Primary School	Local authority
Pil Primary School	Local authority
Plasnewydd Primary School	Local authority

<b>School</b>	<b>Admission authority</b>
Porthcawl Primary School	Local authority
Tondu Primary School	Local authority
Trelales Primary School	Local authority
Tremains Primary School	Local authority
Tynyrheol Primary School	Local authority
West Park Primary School	Local authority
<b>English-medium voluntary controlled primary schools</b>	
Pen y Fai Church in Wales Primary School	Local authority
<b>English-medium voluntary-aided primary schools</b>	
Archdeacon John Lewis Church in Wales Primary School	School governing body
St Mary's Catholic Primary School	School governing body
St Mary's and St Patrick's Catholic Primary School	School governing body
St Robert's Catholic Primary School	School governing body
<b>Welsh-medium primary schools</b>	
Ysgol Gymraeg Bro Ogwr	Local authority
Ysgol Gynradd Gymraeg Calon y Cymoedd	Local authority
Ysgol Cynwyd Sant	Local authority
Ysgol y Ferch o'r Sgêr	Local authority
<b>English-medium secondary schools</b>	
Brynteg School	Local authority
Bryntirion Comprehensive School	Local authority
Coleg Cymunedol Y Dderwen	Local authority
Cynffig Comprehensive School	Local authority
Maesteg School	Local authority
Pencoed Comprehensive School	Local authority
Porthcawl Comprehensive School	Local authority
<b>English-medium voluntary-aided secondary schools</b>	
Archbishop McGrath Catholic High School	Governing body
<b>Welsh-medium secondary schools</b>	
Ysgol Gyfun Gymraeg Llangynwyd	Local authority

## Appendix B - Admission numbers

Admission numbers for those schools for which the local authority is the admission authority.

The admission number for each school does not apply in respect of nursery classes.

Admission numbers remain under review and may be subject to change prior to the start of the 2028-2029 school year.

<b>School</b>	<b>Published admission number</b>
<b>English-medium primary schools</b>	
Abercerdin Primary School	30
Afon y Felin Primary School	19
Betws Primary School	30
Blaengarw Primary School	24
Brackla Primary School	45
Bryncethin Primary School	35
Brynmenyn Primary School	60
Bryntirion Infant School	40
Caerau Primary School	60
Cefn Cribwr Primary School	20
Cefn Glas Infant School	66
Coety Primary School	60
Corneli Primary School	46
Coychurch (Llangrallo) Primary School	19
Croesty Primary School	30
Cwmfelin Primary School	30
Ffaldau Primary School	30
Garth Primary School	30
Litchard Primary School	60
Llangewydd Junior School	90
Llangynwyd Primary School	14
Maes yr Haul Primary School	75
Mynydd Cynffig Primary School	60
Nantyffyllon Primary School	40
Nantymoel Primary School	30
Newton Primary School	34
Nottage Primary School	60
Ogmore Vale Primary School	53

<b>School</b>	<b>Published admission number</b>
Oldcastle Primary School	60
Pencoed Primary School	72
Penybont Primary School	45
Pil Primary School	30
Plasnewydd Primary School	45
Porthcawl Primary School	28
Tondu Primary School	42
Trelales Primary School	30
Tremains Primary School	65
Tynyrheol Primary School	10
West Park Primary School	55
<b>English-medium voluntary controlled primary schools</b>	
Pen y Fai Church in Wales Primary School	30
<b>English-medium voluntary-aided primary schools</b>	
Archdeacon John Lewis Church in Wales Primary School	30
St Mary's Catholic Primary School	30
St Mary's and St Patrick's Catholic Primary School	25
St Robert's Catholic Primary School	22
<b>Welsh-medium primary schools</b>	
Ysgol Gymraeg Bro Ogwr	54
Ysgol Gynradd Gymraeg Calon y Cymoedd	30
Ysgol Cynwyd Sant	45
Ysgol y Ferch o'r Sgêr	33
<b>English-medium secondary schools</b>	
Brynteg School	333
Bryntirion Comprehensive School	221
Coleg Cymunedol Y Dderwen	276
Cynffig Comprehensive School	180
Maesteg School	228
Pencoed Comprehensive School	214
Porthcawl Comprehensive School	246

School	Published admission number
<b>English-medium voluntary-aided secondary schools</b>	
Archbishop McGrath Catholic High School	145
<b>Welsh-medium secondary schools</b>	
Ysgol Gyfun Gymraeg Llangynwyd	165

## Proposed School Admissions Policy 2027-2028 - Welsh Language Impact Assessment

Stage 1 – Information Gathering	
<p><b>NOTE:</b> As you complete this tool you will be asked for <b>evidence to support your views</b>. Please see Welsh Language Impact Assessment Guidance for more information on data sources.</p>	
<b>Proposal Name:</b>	School Admissions Policy 2027-2028
<b>Department</b>	Education, Early Years and Young People
<b>Service Director</b>	Mr Lindsay Harvey – Corporate Director
<b>Officer Completing the WLIA</b>	Emma Giles, Senior Pupil Services Officer
<b>Email</b>	Emma.giles@bridgend.gov.uk
<b>Phone</b>	01656 643449
<b>Brief Description</b>	The proposed school admission arrangements for the 2027-2028 school year for those schools in Bridgend for which the local authority is the admission authority. That is, all community schools maintained by the local authority and now including information on the Co-ordinated Admission Arrangements which includes the voluntary-aided schools.
<b>Date</b>	10/12/2025
<b>Please outline who this proposal affects? (Service Users, Employees, Wider Community)</b>	Learners and their families/carers. Schools. The wider community.

<b>What are the aims of the policy, and how do these relate to the Welsh Language?</b>	<p>The admission of learners to those schools, for which the local authority is the admission authority, in accordance with all relevant legislation and in a manner that is fair and timely.</p> <p>The local authority is the admission authority for all Welsh-medium schools in Bridgend.</p>
<b>Who will benefit / Could the policy affect Welsh language groups? If so, list them here.</b>	<p>All learners for whom education is sought at a school for which the local authority is the admission authority. Therefore, this includes all learners for whom education through the medium of Welsh is preferred.</p> <p>Schools for which the local authority is the admission authority.</p> <p>The wider community.</p>
<b>Current linguistic profile of the geographical area(s) concerned</b>	<p>The ONS recently published the data for the national Census 2021 (Census date 21 March 2021). The 10-year Census provides the most complete information about the Welsh language skills of the population.</p>

	The Census data identifies the following:		
Welsh Language Skills of the population (%)			
		Bridgend County Borough	Wales
Can speak Welsh	9%	17.3%	
Can understand spoken Welsh	12.4%	21.3%	
Can read Welsh	10%	16.8%	
Can write Welsh	7.8%	14.8%	
With regards to combinations of Welsh language skills (for example, can speak Welsh but cannot read or write Welsh), 15.2% of the population of Bridgend identified as having some combination of skills, compared to 24.4% for the whole of Wales.			
The data shows that there is a gap in the Welsh language skills of the population of Bridgend when compared to the whole of Wales.			
<b>Other relevant data or research</b>	None.		

## Stage 2 – Impact Assessment

In this section you need to consider the impact, the evidence and any action you are taking for improvement. This is to ensure that the opportunities for people who choose to live their lives and access services through the medium of Welsh are not inferior to what is afforded to those choosing to do so in English, in accordance with the requirement of the Welsh Language (Wales) Measure 2011.

Please note there is a separate impact assessment for Equality and Socio-Economic duty that must also be completed for policy proposals. Remember that effects that are positive for some groups could be detrimental to others - even among Welsh language groups. Consider the effects on different groups. For example, a proposal may be beneficial to Welsh learners, but not to Welsh speakers.

### Will the proposed action affect any or all of the following?

	<b>Does the proposal have any positive, negative or neutral impacts?</b>	<b>Describe why it will have a positive/negative or neutral impact on the Welsh language.</b>	<b>What evidence do you have to support this view?</b>	<b>What action(s) can you take to mitigate any negative impacts or better contribute to positive impacts?</b>
<b>Opportunities for persons to use the Welsh language</b>  For example staff, residents and visitors The rights of Welsh speakers and learners to use Welsh when dealing with the council and for staff to use Welsh at Work	Neutral	Every year, the proposed policy is published in Welsh. For the required consultation process there is opportunity for any responses to the consultation to be received and considered in Welsh. There is no change to this process for the proposed policy for 2027-2028.	Proposed policy document and communications with consultees.	None.

## Stage 2 – Impact Assessment

Will the proposed action affect any or all of the following?

	<b>Does the proposal have any positive, negative or neutral impacts?</b>	<b>Describe why it will have a positive/negative or neutral impact on the Welsh language.</b>	<b>What evidence do you have to support this view?</b>	<b>What action(s) can you take to mitigate any negative impacts or better contribute to positive impacts?</b>
<b>Numbers and / or percentages of Welsh speakers</b>  For example, Welsh Medium Education / Study Opportunities. Links with the Welsh Government's Cymraeg 2050 Strategy / BCBC Five Year Welsh	Positive	School admissions in Wales are governed by specific legislation and a statutory code, which aim to ensure that admissions to school are fair and timely. As is the case every year, the proposed policy for 2027-2028 covers the arrangements for admission of learners to those schools in Bridgend, for which the local authority is the admission authority - this includes all Welsh-medium schools in Bridgend. The arrangements described in the proposed policy accord with the legislative requirements. The	Annual capacity calculations for Ysgol Gymraeg Bro Ogwr.  An ongoing demand for part-time Nursery places at Ysgol Gymraeg Bro Ogwr, may be unmet in future years if the capacity is not increased.  For January and April 2024 and 2025 all applications were offered a place and there were no refusals.  Due to the requirement to convert any unfilled full-time Nursery places to accommodate the part-time Nursery applications,	From September 2024 there has been an increase to the virtual PAN for Nursery capacity at Ysgol Gymraeg Bro Ogwr:  Full-time capacity 61 places (61 pupils) Part-time capacity 15 places (30 pupils)

		<p>arrangements support and enable parents/carers to express their school preferences, whether those be for English-medium or Welsh - medium schools.</p> <p>Published admission numbers (PAN) for each school form an intrinsic and important part of school admission arrangements. If the PAN for any particular year group increases, this means that there is the opportunity to increase the number of pupils into that year group and school.</p> <p>For this admission year (2027-2028) the local authority is proposing a double mobile classroom at Ysgol Gymraeg Bro Ogwr to provide an additional 60 Welsh- medium places, as an interim solution until the new Band B school is</p> <p>the impact on the full-time Nursery provision for the last four years is that there were no places available for an in-year admissions/transfers. The proposed increase in capacity by the provision of a double mobile classroom will alleviate this pressure and offer more Welsh-medium places.</p>	
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	<p>complete. This will help to meet the immediate demand for Welsh-medium pupil places in the area and increase the uptake of Welsh-medium places. It also contributes to meeting Welsh Government aim of one million Welsh speakers by 2050.</p> <p>This provision will be used to provide additional capacity for Nursery provision at the school due to the demands for places at the school.</p> <p>Ysgol Gymraeg Bro Ogwr only has capacity for two part-time nursery places and on an annual basis the local authority is required to convert any residual full-time nursery places, where available, to part-time places in order to meet demand.</p> <p>The proposed double mobile classroom would allow for an increased part-time nursery provision without</p>	
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		impacting the full-time nursery provision.		
<p><b>Opportunities to promote the Welsh language</b></p> <p>For example, status, use of Welsh language services, use of Welsh in everyday life in work and in the community</p> <p>Actively encourage and promote the use of our services in Welsh to see an increase in demand over time.</p>	Neutral	<p>Statements above are applicable.</p> <p>Every year, the School Admissions Policy is published in Welsh. For the required consultation process there is opportunity for any responses to the consultation to be received and considered in Welsh.</p>	Statements above are applicable.	None.
<p><b>Compliance with the Council's <u>Statutory Welsh Language Standards</u></b></p> <p>For example, increasing or reducing the Council's ability to deliver services through the Medium of Welsh.</p>	Neutral	<p>The School Admissions Policy is made available in Welsh every year, both at the consultation stage and the determination stage.</p> <p>There is, and will be, no difference for the proposed policy for 2027-2028.</p> <p>School admission application forms are</p>	<p>Policy documents.</p> <p>Admission application forms.</p> <p>The local authority's website and 'My Account' where parents/carers can apply for a school place online, are bilingual.</p>	None.

Consider the rights of Welsh speakers to use Welsh when dealing with the Council and for staff to use Welsh at Work		made available in Welsh every year, and this will be no different for 2027-2028.		
<b>Treating the Welsh language, no less favourably than the English language</b>	Neutral	<p>As in every year, the arrangements set out in the proposed policy for 2027-2028 continue to reflect and support the fundamental right of parents/carers to express their preferences for schools, in accordance with admissions legislation in Wales.</p> <p>The proposed policy for 2027-2028 continues to set out the actions that the local authority will take if places at any school are oversubscribed. There are no changes to the dedicated oversubscription criteria applicable to Welsh-medium schools. These criteria are no less favourable than those for oversubscribed English-</p>	<p>For the Reception admission rounds, the percentage of the total applications received for which the expressed first preference school was a Welsh-medium school increased each from September 2019, and has remained consistent for September 2023, although there was a slight decrease for September 2024, there has been an increase for September 2025 as follows:</p> <p>September 2019 – 9.0%  September 2020 – 9.2%  September 2021 – 9.7%  September 2022 – 9.3%  September 2023 – 9.1%  September 2024 – 7.7%  September 2025 – 10.5%</p>	<p>The local authority is currently working with the Welsh Education Forum (WEF) and through the work of developing the Welsh in Education Strategic Plan (WESP), to identify the benefits in the development of Welsh-medium school catchment areas.</p>

		<p>medium schools. The policy reflects that there are no catchment areas for Welsh-medium schools in Bridgend. However, this does not present a disadvantage for any parent/carer applying for a Welsh-medium school, as proximity to the school is used as the alternative oversubscription criteria.</p>		
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### Stage 3 - Strengthening the proposal

Having listed actions in section 2 which may mitigate any negative impacts or better contribute to positive impacts – please record below which ones you will imbed into the policy proposal and who will be responsible for them.

Also consider is the proposal necessary? Would it be possible to meet demand without any new developments? Could other existing provision be used? Where should the development be?

What are you going to do?	When are you going to do it?	Who is responsible?
The local authority will continue to promote Welsh-medium education via the WEF and through the delivery of the approved WESP	Timescales agreed in the WESP.	The local authority and partners.
Continue to offer discretionary free home-to-school transport for pupils residing over the statutory distance of <ul style="list-style-type: none"> <li>two miles for primary school pupils</li> <li>three miles for secondary school pupils and</li> <li>over 1.5 miles for nursery pupils</li> </ul> to their nearest Welsh-medium school, even if that school is not the nearest school to their home.	Ongoing.	The local authority.
Progress a strong School Modernisation Programme with a significant increase in the number and availability of Welsh-medium nursery and primary school places across Bridgend.	In line with the delivery of Band B of the 21 <sup>st</sup> Century Schools Modernisation Programme outlined in the approved WESP.	

If ways of reducing the impact have been identified but are not possible to implement, please explain why. Give sufficient detail of data or research that has led to your reasoning.

What was identified?	Why is it not possible?
Not applicable	Not applicable

#### Stage 4 – Review

For all policy proposals, whether it is a Significant Key Decision or not, you are required to forward this assessment to Welsh Language services – [WLS@bridgend.gov.uk](mailto:WLS@bridgend.gov.uk) and the Consultation and Engagement team – [consultation@bridgend.gov.uk](mailto:consultation@bridgend.gov.uk) in the first instance for some initial guidance and feedback.

It is important to keep a record of this process so that we can demonstrate how we have considered and built-in sustainable Welsh language considerations wherever possible. Please ensure you update the relevant sections below in collaboration with the relevant departments.

Welsh Language Services Comments	Date Considered	Brief description of any amendments made following Welsh Language Services feedback
Consultation Comments	Date Considered	Brief description of any amendments made following consultation

**Stage 5 – Monitoring, Evaluating and Reviewing**

How and who will you monitor the impact and effectiveness of the proposal?

Ongoing data analysis and reporting in respect of school admissions. An annual report is required by legislation and all admission policies are sent to Welsh Government by 15 April in the determination year.

**Stage 6 – Summary of Impacts for the Proposal**

Provide below a summary of the impact assessment, to include some of the main positive and negative impacts along with an overview of actions taken since the impact assessment to better contribute to more positive impacts.

Opportunities for persons to use the Welsh language – neutral impact.

Numbers and / or percentages of Welsh speakers – neutral impact.

Opportunities to promote the Welsh language – neutral impact.

The local authority's compliance with the statutory Welsh Language Standards – neutral impact.

Treating the Welsh language, no less favourably than the English language – neutral impact.

No additional actions have been taken to better contribute to more positive impacts since the consultation on the proposed arrangements (which was undertaken in accordance with the Education (Determination of Admission Arrangements) (Wales) Regulations 2006 and the statutory School Admissions Code 2013).

Stage 7 – Sign off			
Name of Officer completing WLIA	Emma Giles	Service Director name:	Lindsay Harvey
Position	Senior Pupil Services Officer		Is implemented with no amendments
I recommend that the proposal: (Highlight decision)			Is implemented taking into account the mitigating actions outlined
			Is rejected due to disproportionate negative impacts on the Welsh language
Signature		Service Director Signature	
Date		Date	

# Agenda Item 10

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>SCHOOL MODERNISATION PROGRAMME PORTHCAWL WELSH-MEDIUM SEEDLING SCHOOL AND CHILDCARE</b>
<b>Report Owner / Responsible Chief Officer / Cabinet Member</b>	<b>CABINET MEMBER FOR EDUCATION AND YOUTH SERVICES</b> <b>CORPORATE DIRECTOR – EDUCATION, EARLY YEARS AND YOUNG PEOPLE</b>
<b>Responsible Officer:</b>	<b>GAYNOR THOMAS MANAGER, SUSTAINABLE COMMUNITIES FOR LEARNING</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon policy framework or procedure rules.</b>
<b>Executive Summary:</b>	<ul style="list-style-type: none"><li><b>Approval is sought to tender the Porthcawl Welsh-medium Seedling School and Childcare scheme, subject to obtaining Welsh Government funding approval for the childcare element of the scheme (contract award will not take place until funding is confirmed and planning approval granted).</b></li></ul>

## 1. Purpose of Report

1.1 The purpose of this report is to seek Cabinet approval to invite tenders for the Porthcawl Welsh-medium Seedling School and Childcare scheme, with the award of contract subject to the Council obtaining Welsh Government funding approval for the childcare element of the scheme (contract award will not take place until funding is confirmed and planning approval granted).

## 2. Background

2.1 Following a desktop appraisal of options for developing a Welsh-medium seedling school with co-located childcare in the Porthcawl area, a report was submitted to Cabinet in September 2021, and approval was received to submit an expression of interest to Welsh Government in respect of a second tranche of the Welsh-medium capital grant funding.

- 2.2 Welsh Government subsequently approved the expression of interest for 100% Welsh funding support and on 16 November 2022, Council gave permission for a capital budget for this scheme's design and survey costs (up to tender stage) to be included in the Council's capital programme (on the assumption that costs will be fully recovered once Welsh Government has formally approved the Business Justification Case).
- 2.3 The seedling school is a 'starter class' with 30 full-time-equivalent nursery places, and 30 reception places. The seedling provision will be operated and governed by Ysgol y Ferch o'r Sgêr, and pupils would transition to that school at Year 1 to conclude their primary education, that is until a Welsh-medium primary school is established in Porthcawl (on 21 January 2020, Cabinet gave 'approval in principle' to the development of a new Welsh-medium school to serve the Porthcawl area as part of a future band of the School Modernisation Programme, to be aligned to the development of the Porthcawl Regeneration scheme).
- 2.4 There was no requirement to consult on the proposal under the School Organisation Code, since this proposal does not fall within any of the elements of school reorganisation that require the publication of proposals under the statutory process.
- 2.5 Notwithstanding the fact that there was no statutory requirement to consult on the proposal, the then Education and Family Support Directorate wished to undertake a (non-code) public consultation by means of the 'Consultations' section of the Council's website, to obtain stakeholder views. Consequently, in December 2022, Cabinet gave permission to consult on the proposal to establish a Welsh-medium seedling school and childcare provision for the Porthcawl area on land at the Porthcawl Primary School site.
- 2.6 The consultation exercise ran from 28 February 2023 to 11 April 2023 (views were sought from key stakeholders). In June 2023, Cabinet gave approval to establish a Welsh-medium seedling school and childcare provision for the Porthcawl area on land at the Porthcawl Primary School site.

### **3. Current situation**

- 3.1 The scheme has been fully designed, and the planning application was made on 12 September 2025. The local authority is currently awaiting the outcome of this process.
- 3.2 In October 2025, Welsh Government requested the submission of a revised Business Justification Case (BJC) in respect of the scheme, due to the anticipated uplift in estimated costs since the original expression of interest was approved.
- 3.3 Following a revision of pre-tender estimated costs, in October 2025, separate revised BJC's were submitted to Welsh Government in respect of the seedling school and the childcare elements of the scheme.
- 3.4 On 10 December 2025, Welsh Government gave in principle approval of the revised school element pre-tender total estimated cost of the project (that is, £5,442,918). However, the local authority is awaiting a Welsh Government decision on the revised childcare element of the funding (that is, £951,970). It is anticipated that this will be

received shortly. The school and childcare facilities are parts of a single build on the Porthcawl site, and will be tendered as a whole.

- 3.5 The Major Projects Team has provided a revised programme based on an anticipated January 2026 Welsh Government funding decision. Subject to funding approval being received as programmed, the revised opening date is projected to be January 2027.
- 3.6 It is intended that construction will be competitively tendered via the South East and Mid Wales Collaborative Construction Framework (SEWSCAP4). The invitation to tender (ITT) for the scheme can be undertaken at risk, 'subject to necessary approvals,' but the tender award will not be able to take place until funding is confirmed and planning approval granted. The ITT will make it clear that the tender is subject to necessary approvals. A report will be presented to Cabinet when tender returns have been received and evaluated, seeking approval to award a contract, subject to all necessary approvals and funding being in place.

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

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

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

- 5.1 The Well-being of Future Generations (Wales) Act 2015 Assessment provides a comprehensive summary of the outcomes expected from the implementation of the service.

Long-term	The scheme fulfils the Council's statutory duty to provide sufficient pupil places and will allow teaching and learning to take place in a building and site which is suited to the needs of the pupils and staff. The scheme would provide additional Welsh-medium primary pupil places to serve the Porthcawl area and thereby support the authority's Cymraeg 2050 aspirations
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Prevention	The Council has a statutory duty to ensure there are a sufficient supply of school places, and this scheme will safeguard the Council's position in terms of any potential legal challenge in this regard.
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Integration	Providing sufficient places ensures that the curriculum can be delivered and meets the social, environmental, and cultural objectives of pupils and the community it will serve. It is intended that construction will be competitively tendered the SEWSCAP4 Framework. This provides opportunities for local companies to engage with the main contractor for inclusion in their supply chain, via 'Meet the Buyer' events. This would support economic activity in the area. Social value will be maximized.
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**Collaboration** The Council will work effectively with the school, Estyn, health, town and community councils and many internal and external partners to ensure that the building meets the short-term and future needs of the users and the community which it will serve. Officers will continue to work with the designers in developing the scheme to ensure that the building design is sustainable and energy efficient and delivers on the decarbonisation agenda.

**Involvement** This scheme was subject to a long list of education and site options. These were systematically evaluated and have been reduced from a long list to a short list to confirm the preferred option. Further work involved the engagement of potential stakeholders including Cabinet, members, governors, staff, pupils, community, internal and external partners during the consultation exercise.

As a result of the assessment, it is considered that there will be a positive impact upon the achievement of well-being goals/objectives.

## **6. Climate Change and Nature Implications**

6.1 In recognition of the importance of decarbonisation to help protect and sustain the environment over the long term and in line with our climate change ambitions the seedling school will be Net Zero Carbon.

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

7.1 The scheme will be developed with a recognition that there is a duty which is reflected under Bridgend County Borough Council's Safeguarding Policy to safeguard and promote the wellbeing of children, young people, and adults at risk of abuse or neglect and to ensure that effective practices are in place throughout the Council and its commissioned services.

## **8. Financial Implications**

8.1 The scheme is intended to be fully funded by Welsh Government (that is, £5,442,918 Welsh-medium Capital Grant and £951,970 Childcare Grant).

8.2 Once the revised BJC's are approved, Welsh Government should confirm the grant funding, which will then be added to the capital programme.

8.3 A construction contract will not be awarded until the necessary funding approvals are in place, and planning approval confirmed.

## **9. Recommendations**

9.1 It is recommended that Cabinet approval is given to invite tenders for the Porthcawl Welsh-medium Seedling School and childcare scheme, with the award of contract subject to the Council obtaining Welsh Government funding approval for the childcare element of the scheme (contract award will not take place until funding is confirmed and planning approval granted).

## **Background documents**

None

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# Agenda Item 11

Meeting of:	CABINET
Date of Meeting:	3 FEBRUARY 2026
Report Title:	BUDGET MONITORING 2025-26 – QUARTER 3 REVENUE FORECAST
Report Owner/ Responsible Chief Officer / Cabinet Member:	CABINET MEMBER FOR FINANCE AND PERFORMANCE 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:	<ul style="list-style-type: none"> <li>The net revenue budget for 2025-26 is £383.226 million. The overall projected year end position at 31st December 2025 is a net under spend of £9.256 million (2.4% of the net revenue budget).</li> <li>There is a projected under spend of £8.652 million on Council wide budgets. This primarily relates to additional interest anticipated from current investments (£1.599 million) and savings on Minimum Revenue Provision (MRP) charges following the change in policy on the calculation of MRP (£1.004 million), additional grant from Welsh Government towards the teachers' pay award 2025-26 along with the confirmed National Joint Council (NJC) pay awards being lower than provided for.</li> <li>There continues to be an underlying pressures on directorate budgets primarily within Inclusion Services, Children's Services and the Chief Executive's Directorate.</li> <li>The budget approved for 2025-26 included budget reduction proposals totalling £8.379 million. The current position is a projected shortfall on the</li> </ul>

	<b>savings target of £973,000, or 10.81% of the overall reduction target.</b>
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## **1. Purpose of Report**

1.1 The purpose of this report is to provide Cabinet with an update on the Council's revenue financial position as at 31st December 2025.

## **2. Background**

2.1 On 26th February 2025, Council approved a net revenue budget of £383.338 million for 2025-26 based on the provisional local government settlement announced by Welsh Government on 11th December 2024. The Welsh Government announced its final settlement on the 20th February 2025. The Final Local Government Settlement for Bridgend was £112,234 less than provided in the Provisional Settlement mainly due to data changes in the Non-Housing Revenue Account (HRA) element of Welsh Government's funding formula. This decreased the net revenue budget for 2025-26 to £383.226 million. The updated revenue budget was outlined in a report to Council on 12th March 2025, where it was also confirmed that no changes were made to the levels of council tax, or budget pressures and reductions approved by Council on 26th February 2025.

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

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

### **3.1 Summary financial position at 31st December 2025**

3.1.1 The Council's net revenue budget and projected outturn for 2025-26 is shown in **Table 1** below.

**Table 1- Comparison of budget against projected outturn at 31st December 2025**

Directorate/Budget Area	Original Budget 2025-26 £'000	Revised Budget 2025-26 £'000	Projected Outturn Q3 2025-26 £'000	Projected Over / (Under) Spend 2025-26 £'000	Projected Over / (Under) Spend Qtr 2 2025-26 £'000
<b>Directorate</b>					
Education, Early Years and Young People	154,862	158,786	158,281	(505)	(289)
Social Services and Wellbeing	115,909	119,585	119,026	(559)	(117)
Communities	33,754	34,429	34,548	119	77
Chief Executive's	24,815	25,762	26,103	341	782
<b>Total Directorate Budgets</b>	<b>329,340</b>	<b>338,562</b>	<b>337,958</b>	<b>(604)</b>	<b>453</b>
<b>Council Wide Budgets</b>					
Capital Financing	5,958	5,907	3,303	(2,604)	(1,227)
Levies	10,209	10,209	10,209	0	0
Apprenticeship Levy	750	869	874	5	0
Council Tax Reduction Scheme	17,054	17,054	17,221	167	214
Insurance Premiums	1,363	1,363	1,507	144	12
Repairs & Maintenance	670	670	600	(70)	0
Pension Related Costs	430	430	462	32	32
Other Council Wide Budgets	17,452	8,162	1,836	(6,326)	(5,381)
<b>Total Council Wide Budgets</b>	<b>53,886</b>	<b>44,664</b>	<b>36,012</b>	<b>(8,652)</b>	<b>(6,350)</b>
<b>Total</b>	<b>383,226</b>	<b>383,226</b>	<b>373,970</b>	<b>(9,256)</b>	<b>(5,897)</b>

3.1.2 The overall projected position at 31st December 2025 is a net under spend of £9.256 million comprising a £604,000 net under spend on directorate budgets and a net under spend of £8.652 million on Council wide budgets. A detailed analysis of the more significant projected under and over spends is set out in section 3.3.

3.1.3 The projected under spend has improved from the £5.897 million reported at quarter 2 primarily due to savings on Minimum Revenue Provision (MRP) charges following the change in policy on the calculation of MRP (£1.004 million).

3.1.4 The main financial pressures remain in the Chief Executive's Directorate, Inclusion Services within the Education, Early Years and Young People Directorate and Children's Services in the Social Services and Wellbeing (SSWB) Directorate.

3.1.5 The underlying pressures for the Chief Executive's directorate is mainly due to delays in implementing Medium Term Financial Strategy (MTFS) budget reduction proposals and projected shortfalls on Court Cost income.

3.1.6 There continues to be pressure in learning disabilities and physical disability/sensory impairment services driven by the complexity of need and demand across these services. There is also significant pressure in children's residential placements. The Social Services Improvement Board is overseeing a number of actions to address the pressures in line with the 3 year Plans for Sustainable Care and Support for Adults and for Children and Family services.

3.1.7 There continues to be significant demand for additional learning needs (ALN) support at schools. The demand is high in particular for pupils requiring neurodevelopmental, behavioural, communication and complex medical support.

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

3.1.8 There have been a number of budget virements and technical adjustments between budgets since the Medium Term Financial Strategy (MTFS) was approved by Council in February 2025. The budget position is reported on the assumption that these virements will be approved

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

#### **Budget Virements**

<b>Service vired from / to</b>	<b>Amount</b>
Transfer of budget for a Directorate Support Officer from the Chief Executive's Directorate to the Social Service and Wellbeing Directorate to reflect line management responsibilities following a restructure of Business Support.	£37,073
Transfer of budget approved by Council in February 2024 (SSWB5 – Direct Payments Reimbursements) from the Social Services and Wellbeing Directorate to the Chief Executive's Directorate to fund a Direct Payments Assistant post.	£37,073
Transfer of funding from Directorate print budgets to ICT to reflect reduced print activity due to hybrid working and ICT being unable to recover the fixed costs of printers and photocopiers through the re-charge to service departments.	£140,000
Transfer of funding from Directorate mobile phone budgets to ICT to reflect reduced costs following a procurement exercise being undertaken on telephony contracts with MTFS savings achieved of £285,000 achieved from 1 April 2024.	£90,793
Transfer of funding from the centrally held MTFS pressure budget to ICT to mitigate the shortfall in directorate budgets available to be transferred to ICT to reflect the full achievement of the £285,000 MTFS target from the telephony procurement exercise.	£194,207
Allocation of funding retained centrally in respect of Youth Worker pay award September 2025 – confirmed December	£9,882

#### **Technical Adjustments**

<b>Service vired from / to</b>	<b>Amount</b>
Transfer of inflationary uplifts not confirmed when the Medium Term Financial Strategy was agreed that are held centrally until evidence of the uplift is provided by the service areas (detailed in paragraph 3.1.10).	£769,375

## **Price Inflation**

3.1.10 When the budget was set, very little funding was allocated to directorates for pay and price inflation, as most had not been determined for the forthcoming year. The majority of the price provision was retained centrally within Council wide budgets, to be allocated as further information was known about specific contractual price increases. The technical adjustments table above outlines the amount released from these budgets during quarter 3, based upon evidenced price inflationary uplifts and include £509,070 for Waste Collection and Disposal contracts, £133,306 for Fostering Allowances and £107,729 for Home to School Transport contracts.

3.1.11 Inflation rates have fluctuated since the budget was set – CPI was 2.8% when the budget was set in February 2025, increasing to 4.1% in September 2025, then falling to 3.2% in November 2025. There is ongoing uncertainty on energy cost increases in 2026-27 and the general trajectory of CPI, therefore it is likely that the provision set aside in the MTFS for 2026-27 will need to be supplemented by any funding not committed from the price inflation budget this year.

## **Budget Reduction Proposals**

3.1.12 The net budget for the financial year has been set assuming full implementation of the current year budget reduction requirements across the Council's budget, which amount to £8.379 million. Where proposals to meet this requirement have been delayed or are not achievable directorates have been tasked with identifying alternative proposals to meet their requirements such as holding additional vacancies, or bringing forward alternative budget reduction proposals.

3.1.13 In February 2025 Council approved the Medium Term Financial Strategy for 2025-26 to 2028-29. This identified the need to develop recurrent budget reduction proposals, based on the most likely scenario, amounting to £39.516 million over the next four years. Against that background it is essential that expenditure is kept within the overall approved budget and that longer term proposals continue to be developed so that the Council has as much flexibility as possible to meet the challenges which lie ahead.

3.1.14 At year end consideration will be given to any budget over spends to determine whether these should be carried forward as a first call on the directorate budget for the following year. Similarly, consideration will be given to requests from directors to carry forward any planned directorate under spends for specific purposes into the following year, in line with the Council's Reserves and Balances Protocol, as long as these can be met from within the Council's cash limited budget for 2025-26. This is in line with the reports to Cabinet and Council on the MTFS, and the Council's Financial Procedure Rules.

### 3.2 Monitoring of Budget Reduction Proposals

#### Prior Year Budget Reductions

3.2.1 The Revenue Budget Outturn report was presented to Cabinet on 24th June 2025. In the report it was highlighted that there were £415,000 of prior year budget reduction proposals that were not met in full, with a total outstanding balance to be met of £290,000. In addition, of the 2024-25 budget reduction proposals of £13.045 million, it was reported that there was a total outstanding balance to be met of £1.569 million. Directors have been asked to identify if any of these proposals are still not likely to be achieved in full during the 2025-26 financial year, and to identify mitigating actions that will be undertaken to achieve them. All remaining outstanding prior year budget reductions are outlined in **Appendix 1** with a summary per directorate provided in **Table 2**.

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

DIRECTORATE /BUDGET REDUCTION AREA	Total Budget Reductions Required	Total Budget Reductions Likely to be Achieved	Shortfall
	£'000	£'000	£'000
Education, Early Years and Young People	291	149	142
Social Services and Wellbeing	501	206	295
Communities	464	314	150
Chief Executives	1,567	1,341	226
<b>TOTAL</b>	<b>2,823</b>	<b>2,010</b>	<b>813</b>

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

3.2.2 **Table 2** shows that of the £2.823 million outstanding reductions, £2.010 million is likely to be achieved in 2025-26 leaving a shortfall of £813,000. Proposals still not likely to be achieved include:

- EDFS19 – Communication and Relationships Team (£142,000 shortfall). A new Team Lead started on 1st September 2025, however due to staff absences the review has been delayed. It is anticipated to commence in quarter 4 and further updates to Cabinet will be provided as the review progresses.
- SSW13 – Reduction in investment into cultural services (£295,000 shortfall). Cabinet report in May 2024 approved reductions of £65,000. The shortfall will be covered by maximising grant funding opportunities in 2025-26. However, a long term plan to achieve the shortfall needs to be explored for the saving to be met in 2026-27.
- COM 2 2021-22 – Re-location of Community Recycling Centre from Tythegston to Pyle (£60,000 shortfall). The new site in Pyle opened in

quarter 4 of 2023-24. As the exit terms of the lease in Tythegston are still being worked through the saving has not been achieved. The service have met the shortfall through alternative one-off efficiencies in 2025-26 to deliver a balanced budget position, in particular it has utilised part of the £3.9 million for the Extended Producer Responsibility for Packaging Scheme.

- COM2 2023-24 – Charging Blue Badge Holders for parking (£40,000 shortfall). The Traffic and Transport Team are progressing with the order making process and have carried out an initial engagement on the proposal which is currently being evaluated prior to progressing. Savings have been made elsewhere within Transportation Services to deliver a balanced budget, in particular Car Parking Services.
- CEX22 – Review of ICT Services (£103,000 shortfall). Saving was not met in full due to the timing of the re-procurement exercise on telephony budgets across the Council. The service will still look to find efficiencies in the current year. In the longer term work is being done to look at options for funding and supporting the digital transformation in the Authority.
- CEX25 – Staff savings from Finance senior management team – (£70,000 shortfall). Shortfall in savings target due to failure to implement the proposed Finance Senior Management restructure. The draft MTFS 2026-27 to 2029-30 includes a budget pressure of £70,000 to reinstate this budget reduction proposal as the restructure was consulted on but it did not proceed.

3.2.3 As outlined in the MTFS reports to Cabinet and Council, MTFS Principle 7 states that “*Savings proposals are fully developed and include realistic delivery timescales prior to inclusion in the annual budget. An MTFS Budget Reduction Contingency Reserve will be maintained to mitigate against unforeseen delays*”. An MTFS Budget Reduction Contingency reserve is in place to offset shortfalls on specific budget reduction proposals on a one-off basis where circumstances to achieving them are outside of the directorate’s control. During the financial year, the Section 151 Officer will consider applications from Directorates to the MTFS Budget Reduction Contingency reserve to mitigate some of the shortfalls.

### **Budget Reductions 2025-26**

3.2.4 The budget approved for 2025-26 included budget reduction proposals totalling £8.379 million, which is broken down in **Appendix 2** and summarised in **Table 3** below. The current position is that £6.468 million has been achieved to date with an additional £1.005 million to be achieved by year end, leading to an overall projected shortfall on the savings target by year end of £906,000, or 10.81% of the overall reduction target.

**Table 3 – Monitoring of Budget Reductions 2025-26**

	Total Budget Reductions Required	Total Budget Reductions Achieved to date	Total Budget Reductions Likely to be Achieved	Shortfall
DIRECTORATE /BUDGET REDUCTION AREA	£'000	£'000	£'000	£'000
Education, Early Years and Young People	1,428	740	1,049	379
Schools	1,186	1,186	1,186	0
Social Services and Wellbeing	1,817	1,132	1,560	257
Communities	717	356	556	161
Chief Executive's	688	511	579	109
Corporate/Council Wide	2,543	2,543	2,543	0
<b>TOTAL</b>	<b>8,379</b>	<b>6,468</b>	<b>7,473</b>	<b>906</b>

3.2.5 The most significant budget reduction proposals unlikely to be achieved in full are (> £100,000 shortfall):-

- EEYYP5 – Reduction in Strategy, Performance and Support Group (£121,000 shortfall). The consultation with staff on the restructure has now concluded with the new structure being implemented from the 5th January 2026. Saving will be made in full in 2026-27.
- SCH1 – Efficiency saving against School Delegated Budgets – 1% in 2025-26 (£1.186 million). Whilst the saving is referenced as having been achieved due to the overall reduction in the Individual Schools Budget (ISB), as referenced in paragraph 3.3.1, the reduced budgets have resulted in total projected deficit balances for schools at year end of £5.593 million. Officers are working with schools to bring this overall deficit down.
- SSW8 – Reduction in the provision of number of Supported Living Accommodation units (£190,000 shortfall). It has been determined that this savings proposal is no longer deliverable and work is underway by the service to identify alternative budgets for this to be offset against.

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

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

### 3.3 **Commentary on the financial position at 31st December 2025**

#### **Financial position at 31st December 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 (EEYYP) Directorate, including school delegated budgets, for 2025-26 is £158.786 million. Current projections indicate an under spend of £505,000 compared to the quarter 2 projected under spend of £289,000 at year end. The main variances are:

<b>EDUCATION, EARLY YEARS AND YOUNG PEOPLE DIRECTORATE</b>	<b>Net Budget</b> <b>£'000</b>	<b>Projected Outturn</b> <b>£'000</b>	<b>Projected Variance Over/(under) budget</b> <b>£'000</b>	<b>% Variance</b>
Inclusion Group	8,816	9,119	303	3.4%
Home-to-School Transport	10,892	10,728	(164)	-1.5%
Catering Services	1,863	1,198	(665)	-35.7%

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

Total funding delegated to schools in 2025-26 is £126.541 million.

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

At the start of 2025-26, projections indicated an overall deficit balance for school delegated budgets of £5.206 million at year end. At quarter 2 this had slightly reduced to a projected deficit of £5.087 million. At quarter 3 the projected deficit balance has increased to £5.593 million. There are 37 primary schools, 5 secondary schools and 2 special schools (75% of all schools) projecting a deficit balance at year end.

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. All schools projecting a deficit budget position have completed recovery plans which have been approved in line with the Financial Scheme for Schools. Schools with budget 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.

## **Central Education, Early Years and Young People Directorate budgets**

### **Inclusion Group**

- There is a projected net over spend of £303,000 in quarter 3 compared to £740,000 in quarter 2 across Inclusion Group budgets. The main reason for the improvement is additional grant funding for additional learning needs (ALN) (£650,000) without which the net over spend would be £953,000.
- The main reason for the underlying projected over spend is that there continues to be significant demand for ALN support at schools resulting in a projected over spend of £303,000 at quarter 3, down from £536,000 at quarter 2. The improved position is due to an allocation of £290,000 from the ALN grant. The demand is high in particular for pupils requiring neurodevelopmental, behavioural, communication and complex medical support. The number of pupils supported during the spring term was 303, increasing to 345 during the summer term, and 348 during the autumn term.
- Recoupment budgets had a projected over spend of £102,000 at quarter 2 which has improved to a projected over spend of £35,000 at quarter 3. The improved position is due to an allocation of £360,000 from the ALN grant. Numbers have remained stable in inter-county recoupment placements, with 20 during summer term 2025, down to 18 during autumn term 2025. The underlying pressure is due to additional support being provided at Heronsbridge School and Ysgol Bryn Castell to mitigate further external placements. The projected costs for the support provided by the special schools alone are currently £658,000, however this approach prevents higher costs that would have been incurred with external providers.
- The draft MTFS 2026-27 to 2029-30 includes a £250,000 budget pressure for ALN services, primarily for the additional support being provided at Heronsbridge School and Ysgol Bryn Castell to mitigate further external recoupment places. It also includes an ALN budget pressure of £800,000 which includes additional resource bases in schools, particularly for communication and autism, due to the significant increase in the number of pupils with emotional, social and behavioural needs, and pupils with complex medical needs and physical disabilities.

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

- There is a projected under spend of £164,000 on HtST at quarter 3, compared to the projected under spend of £393,000 at quarter 2. The underlying projected under spend is as a result of achieving efficiencies in contracts throughout 2025-26, however the projected under spend has reduced from quarter 2 as there have been an increase in costs for college and special school transport.
- The projected under spend reflects that the MTFS budget reduction proposal in this service area for 2025-26 of £675,000 will be met in full – EEYYP 2 – review of HtST. However, given the reduction in projected under spend contracts will continue to be reviewed in order to meet the 2026-27 MTFS budget reduction proposal of £417,000.

### **Catering Services**

- Catering Services is projecting an under spend of £665,000 in quarter 3 compared to the projected under spend of £494,000 in quarter 2.
- The projected under spend continues to be based on the full implementation of the Universal Primary Free School Meals (UPFSM) by Welsh Government and the accompanying grant funding to support the initiative.

- The increase in the projected under spend is due to the uplift to the recoverable amount from £3.20 to £3.40 per meal from Welsh Government, which has been backdated to September 2025.
- The draft MTFS for 2026-27 to 2029-30 includes a £300,000 budget reduction proposal for efficiencies in the Catering Services budget.
- The projected under spend takes into account the delay in the implementation of MTFS budget reduction EEYYP1 – Cessation of the meals at home service which is currently reporting a shortfall of £56,000. The service has now ceased so no further costs should be incurred with the saving being made in full from 2026-27.

### 3.3.2 Social Services and Wellbeing Directorate

The Directorate's net budget for 2025-26 is £119.585 million. Current projections indicate an under spend of £559,000 at year end compared to the quarter 2 projected under spend of £117,000. The improved position is due to additional grant funding and, as the narrative sets out, there are still underlying budget pressures in a number of areas, most significantly children's placements. The detailed narrative below sets out the main service areas where projections have improved, including, older people homecare, assessment and care management, and Children's Social Care Early Help and Edge of Care services.

Council approved budget pressures of £8.800 million for the SSWB Directorate in February 2025 as part of the Medium Term Financial Strategy. The funded pressures include £3.250 million to mitigate the ongoing pressures of Care Experienced Children and insufficient numbers of foster carers, £2.020 million for the implications of Real Living Wage (RLW) uplifts on commissioned contracts, £1.282 million for learning disabilities services, £679,000 for mental health services and £540,000 for Physical Disability/Sensory Impairment services.

As noted in the quarter 2 report, 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. There is also significant pressure in children's residential placements. The Social Services Improvement Board is overseeing a number of actions to address the pressure in the adult services budget, including accelerating the work to transform learning disabilities. Further actions have been developed into a 3 year Plan for Sustainable Care and Support for Adults in 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.

The most significant variances for the directorate are :

SOCIAL SERVICES AND WELLBEING DIRECTORATE	Net Budget £'000	Projected Outturn £'000	Projected Variance Over/(under) budget £'000	% Variance
Adult Social Care	79,142	78,028	(1,114)	1.41%
Prevention and Wellbeing	6,380	6,188	(192)	-3.01%
Childrens Social Care	34,063	34,810	747	2.19%

## **Adult Social Care**

There is a projected net under spend of £1.114 million on the Adult Social Care budget, an improvement of £558,000 from the £756,000 projected under spend at quarter 2.

The most significant variances contributing to the under spend are:

<b>ADULT SOCIAL CARE</b>	<b>Projected Variance Over/(under) budget £'000</b>
Learning Disabilities Residential Care	241
Physical Disability/Sensory Impairment Home Care	216
Physical Disability/Sensory Impairment Residential Care	111
Mental Health Residential Care	(106)
Mental Health Home Care	(110)
Older People Direct Payments	(141)
Homes for Older People	(154)
Learning Disabilities Direct Payment	(222)
Mental Health Supported Accommodation	(242)
Older People Homecare	(289)
Assessment & Care Management	(320)

- Learning Disabilities Residential Care – there is a projected over spend of £241,000 which has increased slightly from the projected over spend of £203,000 at quarter 2. While there has been an increase in projected spend for residential/nursing placements of £286,500 (placements have increased from 38 at quarter 2 to 40 at quarter 3 with two new unavoidable placements taking place) the confirmed joint financing income has increased by £335,000 and there has also been an increase in client contributions of £131,000, Given the improved income projections there has been a reduction in the allocation of Social Care Workforce Grant to this area of £200,000.
- Physical Disability/Sensory Impairment Home Care - there is a projected over spend of £216,000 which is comparable to the projected over spend of £225,000 at quarter 2. The projected over spend is based on the current demand for the service which is 99 packages of support (no change since quarter 2), and increased costs for existing placements, due to changing needs.
- Physical Disability/Sensory Impairment Residential Care – there is a projected over spend of £111,000 which is comparable to the £110,000 projected over spend at quarter 2. The projected over spend is due to higher placement numbers than budgeted for.
- The draft MTFS for 2026-27 to 2029-30 includes a £250,000 budget pressure for adult social care pressures, including physical disabilities homecare, learning

disabilities and physical disabilities residential care, as a result of increased placements and increased costs due to changing needs.

- Mental Health Residential Care – there is a projected under spend of £106,000 compared to a projected under spend of £87,000 at quarter 2. Whilst there has been an increase in placement numbers from 48 at quarter 2 to 50 at quarter 3 the projected under spend has improved due to less complex levels of support being provided.
- Mental Health Home care- there is a projected under spend of £111,000 compared to a projected over spend of £85,000 at quarter 2. Since quarter 2, two high cost packages of care have ended and £42,305 of additional joint financing income has been confirmed.
- Older People Direct Payments - there is a projected under spend of £141,000 compared to a projected under spend of £108,000 at quarter 2. This is due to a small net reduction in the current packages of care.
- Homes for Older People – there is a projected under spend of £154,000 compared to a projected under spend of £770,000 at quarter 2. Since quarter 2 there has been an increase in projected staffing, agency and running costs, of £118,000 as well as a decrease in projected client contributions for internal residential homes of £52,000. There has also been an increase in projected costs for externally provided residential and nursing care of £153,000, as well as a decrease in projected client contributions of £294,000. All contributions towards residential care are financially assessed in accordance with the Social Services and Well-being (Wales) Act 2014 but the average income received each year will vary in total depending on the financial position of the people needing care during the financial year – e.g. if there are a large number of people who have savings or assets and are therefore not reliant on the local authority paying their contribution in full, then this will increase the overall average income received per person.
- Learning Disabilities Direct Payments – there is a projected under spend of £222,000 across the Direct Payments budgets in this area compared to a projected under spend of £266,000 at quarter 2. This is based on the current demand for packages of support of 138 (137 at quarter 2).
- Mental Health Supported Accommodation – there is a projected under spend of £242,000 compared to a projected under spend of £256,000 at quarter 2. This continues to be as a result of staffing vacancies with the service.
- Older People Home Care – there is a projected under spend of £290,000 compared to a £151,000 over spend at quarter 2. The number of commissioned Independent Domiciliary care packages across the service area (628) has reduced since quarter 2 (644).
- Assessment & Care Management – there is a projected under spend across Adult Social Care of £320,127 compared to a projected under spend of £109,560 at quarter 2. This is mainly due to this area benefitting from an additional £266,166 of Pathways of Care grant income to maximise the grant while recruitment is being undertaken to core posts.

## **Prevention and Wellbeing**

- There is a projected under spend of £192,000 at quarter 3 which is comparable to the projected under spend of £193,000 at quarter 2.
- The underlying reason for the projected under spend is mainly due to maximisation of grant funding from the Shared Prosperity Fund (£643,000). This is also mitigating the following MTFS saving, £295,000 of which has not been achieved:-
  - SSW13 (2024-25) – £360,000 - Council to reduce its investment into cultural services. This MTFS proposal will be considered as part of the budget setting process for 2026-27.

## **Children's Social Care**

There is a projected net over spend of £747,000 on the Children's Social Care budget compared with the projected net over spend of £832,000 at quarter 2. The most significant variances contributing to this over spend are:-

<b>CHILDREN'S SOCIAL CARE</b>	<b>Projected Variance Over/(under) budget £'000</b>
Care Experienced Children	1,010
Early Help & Edge of Care	(234)

- The projected over spend of £1.010 million for Care Experienced Children has decreased slightly from the £1.050 million projected over spend reported at quarter 2. The underlying over spend is due to a combination of factors:-
  - The Independent Residential Care budget has a projected over spend of £935,511 (quarter 2 - £880,000).
  - The quarter 2 projections were based on 28 care experienced children in independent residential care – this has decreased to 27 placements at quarter 3. Three placements ended during quarter 3 reducing projections by £364,000, offset by two new placements at a projected cost of £300,000 and amendments to existing placements at an additional £117,000. However, it is understood additional placements are anticipated in quarter 4 which means overall numbers and costs will increase unless there are corresponding step downs from residential.
  - In addition, there continues to be insufficient 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 relatively high costs being incurred.
  - Children's Internal Residential Care has a projected net over spend of £226,000 compared to £280,000 in quarter 2. This is mainly due to continued use of agency workers to address operational pressures across the service.

Recruitment is being progressed for vacancies and it is anticipated that agency usage will reduce once the recruitment process is complete.

- Fostering - There is a projected under spend in this area of £625,000. This is primarily due to a projected under spend of £296,000 on the Independent Fostering Agency (IFA) budget based on 34 placements. 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 Supported Living – There is a projected over spend of £526,000 which is the same as the projected over spend reported at quarter 2. This is currently mitigated by the projected under spend in Fostering noted above. The pressure is due to increases in the number of placements (21 in quarter 3 of 2024-25 compared to 27 currently). The draft MTFS 2026-27 to 2029-30 includes a £250,000 budget pressure towards the projected over spend for children's supported accommodation.
- Early Help & Edge of Care – There is a projected under spend of £234,000 compared with the projected under spend of £143,000 at quarter 2. The projected under spend has increased firstly due to £41,000 of Regional Integration Funding being confirmed for Edge of Care services in quarter 3, and secondly continuing staffing under spends due to ongoing vacancies across the team.

### 3.3.3 **Communities Directorate**

The net budget for the Directorate for 2025-26 is £34.429 million. The current projection is an anticipated over spend of £119,000 compared with the projected over spend of £77,000 at quarter 2.

As set out in the Draft Medium Term Financial Strategy 2026-27 to 2029-30 report to Cabinet on 13 January 2026, a UK Packaging Extended Producer Responsibility (pEPR) scheme has been introduced in 2025-26 as a means of shifting the full financial cost of managing household packaging waste from taxpayers (local authorities) to the businesses that place it on the UK market. These payments, funded by producers of packaging, are calculated based on the net efficient disposal costs for each material type and for BCBC in 2025-26 equates to £3.922 million. The scheme will enable the directorate to support pressures in their service areas from the waste budget it releases, and consideration is being given to how this is used towards additional waste collection and disposal requirements, both capital and revenue, and in respect of the circular economy. Further details will be provided in the 2025-26 outturn report to Cabinet in June 2026.

The main variances are:

COMMUNITIES DIRECTORATE	Net Budget £'000	Projected Outturn £'000	Projected Variance Over/(under) budget £'000	% Variance
Highway Services	9,168	9,507	339	3.70%
Fleet Services	204	731	527	258.33%
Traffic & Transport	1,341	893	(448)	-33.41%
Parks, Playing Fields & Bereavement	2,807	2,824	17	0.61%
Corporate Landlord	3,646	3,227	(419)	-11.49%

#### Highway Services

- There is a projected over spend of £339,000 at quarter 3 compared with the projected over spend of £233,000 at quarter 2. The underlying reason for the projected over spend is that the service area is not anticipated to meet its vacancy management MTFS saving of £93,000 and a projected over spend on hire charges for vehicles and equipment. The draft MTFS for 2026-27 to 2029-30 includes a budget pressure of £40,000 for Highways Services to support staffing and hire charges for vehicles and equipment.

#### Fleet Services

- There is a projected over spend of £527,000 at quarter 3 compared to the projected over spend of £592,000 at quarter 2. The fleet services team operate on a break-even basis with re-charges for work undertaken on directorates, South Wales Police (SWP) and the general public's vehicles, generating income to support staffing and overhead costs. The underlying projected over spend before the budget virement from waste budgets is due to productivity levels continuing to be impacted by long term sickness and ongoing issues with recruitment and retention difficulties. A market supplement has been introduced in line with the corporate Market Supplement Policy following comparisons with neighbouring authorities and remuneration of HGV technicians, which has seen some limited success in filling vacancies. A report outlining options for service operating models to mitigate the budget position of fleet services was delayed due to officer availability but an external review is now proceeding. The scope, timelines, workstreams and outcomes sought for the evaluation are being finalised with workstreams due to commence in the final quarter of 2025-26. The current forecast is for the review to run into Summer 2026 due to the scope of the work encompassing the waste management element.

#### Traffic and Transport

- There is a projected under spend of £448,000 at quarter 3 compared with a projected under spend of £504,000 at quarter 2. Whilst the service area has benefitted from an MTFS budget pressure of £360,000 approved by Council for 2025-26 towards the shortfall in car park income and the staff car pass scheme which has been impacted by hybrid working, the Council continues to benefit from the temporary income raised from the Salt Lake Car Park in Porthcawl. The projected under spend has reduced by £56,000 from quarter 2 which is mainly due to reduced projections for car park income across the County Borough.

### Parks, Playing Fields & Bereavement Services

- There is a projected over spend of £17,000 at quarter 3 compared to a projected over spend of £184,000 at quarter 2 on Parks, Playing Fields & Bereavement services. The projected over spend on maintenance budgets on Pavilions have improved since quarter 2. The draft MTFS 2026-27 to 2029-30 includes a budget pressure of £50,000 to support maintenance on cemeteries.

### Corporate Landlord

- There is a projected under spend of £419,000 at quarter 3 compared with the £368,000 projected under spend at quarter 2. This is primarily due to staff vacancies as the service continues to experience recruitment difficulties. The improved position from quarter 2 is due to the closure of the Innovation Centre and the consequential reduction in running costs.

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

The net budget for the Directorate for 2025-26 is £25.762 million. There is currently a projected over spend of £341,000 at year end compared to the quarter 2 projected over spend of £782,000. The main variances are:

<b>CHIEF EXECUTIVE'S</b>	<b>Net Budget</b>	<b>Projected outturn</b>	<b>Projected Variance Over/(under) budget £'000</b>	<b>% Variance</b>
	<b>£'000</b>	<b>£'000</b>		
ICT	4,323	4,666	343	7.9%
Partnerships	2,305	2,394	89	3.9%
Housing & Homelessness	4,855	4,515	(340)	-7.0%
Finance	4,436	4,786	350	7.9%

#### ICT

- There is a projected net over spend of £343,000 across ICT budgets compared to a projected net over spend of £230,000 at quarter 2.
- As noted in the quarter 2 report, the projected over spend is mainly due to MTFS saving proposals from 2024-25 and 2025-26 not being fully achieved. There is a shortfall of £103,000 against the 2024-25 MTFS budget reduction proposal CEX 22 – Review of ICT services and a shortfall of £78,000 against the 2025-26 MTFS budget reduction proposal CEX 10 – Restructure of the ICT service, pending a restructure of the service.
- The balance of the projected over spend is primarily due to historic SLA income from schools no longer being realised as the Welsh Government School Hwb project now includes the services previously being re-charged (£177,000).
- As noted in paragraph 3.1.9, during quarter 3 there were three budget virements to ICT budgets. Firstly, the transfer of funding from Directorate Print budgets to ICT to reflect the reduced print activity due to the hybrid working model and ICT being unable to recover the fixed costs of printers and photocopiers through the re-charge to service departments (£140,000). In addition, a procurement exercise was undertaken on telephony contracts with savings of £285,000 achieved from 1 April 2024. However, the current mobile phone budget across all directorates is now only

£128,344 as service areas have vired savings from their mobile phone budgets having seen the reduction in costs to fund over spends in other non-pay areas. The projected under spend on the remaining mobile phone budgets of £90,793 has been vired from individual service area budgets to ICT, with the balance of the MTFS saving (£194,207) being vired from the centrally held budget for MTFS pressures.

#### Partnerships

- There is a net projected over spend of £89,000 across the Partnerships budgets compared to a projected net over spend of £192,000 at quarter 2.
- There continues to be a projected over-spend against the CCTV budget (£73,000) which is mainly due to a reduction in projected income as a result of the contract with the Vale of Glamorgan ending (£71,000).
- There is a projected over spend in Communications and Marketing of £48,000 which is mainly due to increased staffing costs while the service underwent a restructure. The restructure became effective from the 1st October 2025 so the over spend will not be recurring in 2026-27.
- There is a projected over-spend against Pest Control services of £25,000 – which is due to the shortfall in the 2024-25 MTFS budget reduction proposal, CEX 8 - Charging for PEST control services. Due to the continued reduced uptake of the service, the decision was taken to cease the provision of this service by BCBC from 31st October 2025. The Partnerships service will be identifying alternative budgets as part of the 2026-27 budget setting process to mitigate the underlying net budget of £3,950 for the service.
- These projected over spends have been mitigated by a projected under spend on staff budgets within the grant administration team (£60,000) due to the maximisation of grant income.

#### Housing & Homelessness

- There is a projected net under spend of £340,000 on Housing & Homelessness compared to a net projected under spend of £25,000 at quarter 2.
- The overall budget for housing and homelessness has been increased by £400,000 in 2025-26 due to Council approving a MTFS budget pressure to support pressures on the homelessness budget. In addition there has also been an increase of £970,000 due to transfers from Welsh Government into the settlement from previous grant funding.
- Projected spend on Homelessness accommodation in 2025-26 is £4 million (£4.2 million at quarter 2). As well as the core budget (£3.274 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 (£499,000 at quarter 3 compared with £460,000 at quarter 2). The net impact is a projected over spend on accommodation of £227,000 (projected over spend of £466,000 at quarter 2).
- This has been offset by projected under spends on the Brynmenyn Homeless Centre (£138,000) and the four new Houses in Multiple Occupation (HMO) properties (£203,000) due to projected increases in Housing Benefit income. Further projected under spends include maximisation of Supporting People grant (£118,000) and grant funding received for Asylum Seeker Dispersal (£99,000).

### Finance

- There is a projected over spend of £350,000 on Finance budgets which has increased from the quarter 2 projected over spend of £301,000.
- There is a shortfall of £133,000 on Department for Work and Pension (DWP) subsidy contributions towards housing benefit payments in Bridgend compared to the projected shortfall of £91,000 at quarter 2. 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. The draft MTFS for 2026-27 to 2029-30 includes a budget pressure of £91,000 to mitigate this shortfall.
- There is also a projected shortfall of £74,000 on Court Cost income. The draft MTFS for 2026-27 to 2029-30 includes a £75,000 budget pressure to mitigate the shortfall in Court Cost Income collected from council tax and Non Domestic Rates.
- There is also the failure to implement an historic MTFS proposal - (CEX25 (2024-25) – Staff savings from Finance senior management team - £70,000. The draft MTFS for 2026-27 to 2029-30 includes funding of £70,000 to reinstate this budget reduction following a full restructure being proposed and consulted on but which did not proceed.
- The balance is mainly due to a shortfall against the historic vacancy management factor target of £103,000 across Finance budgets.

#### **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 2025-26 is £44.664 million. Current projections anticipate an under spend against this budget of £8.652 million which has improved from the projected under spend at quarter 2 of £6.350 million. The main variances are:-

<b>COUNCIL WIDE BUDGETS</b>	<b>Net Budget</b> <b>£'000</b>	<b>Projected Outturn</b> <b>£'000</b>	<b>Projected Variance Over/(under) budget</b> <b>£'000</b>	<b>% Variance</b>
Capital Financing	5,907	3,303	(2,604)	-44.08%
Council Tax Reduction Scheme	17,054	17,221	167	0.98%
Other Council Wide budgets	8,162	1,836	(6,326)	-77.51%

#### Capital Financing

- The projected under spend of £2.604 million relates to additional interest anticipated from current investments (£1.599 million) and savings on Minimum Revenue Provision (MRP) charges following the change in policy on the calculation of MRP in October 2024 (£1.004 million). Interest rates started to fall from the high of 5% in November 2024, with further reductions to the current rate of 3.75%. 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.
- It should also be noted that this will not be a recurring under spend. As noted in the Treasury Management Quarter 2 Report 2025-26 to Cabinet and Council in November 2025, the Council has loans from the Public Works Loan Board (PWLB)

maturing within the next 3 financial years that it will need to repay and, given the anticipated level of expenditure within the capital programme over the current and coming financial years, including the new rolling fleet replacement programme for waste service vehicles, it is highly likely that new borrowing will be required to replace these maturing loans as well as a need to take out new borrowing to support the Capital Programme over the next few years. It is therefore expected that interest received will reduce, and interest paid will increase.

#### Council Tax Reduction Scheme

- There is currently a projected over spend of £167,000 on the Council Tax Reduction Scheme which has reduced slightly from the £214,000 projected over spend at quarter 1. This is a demand led budget and take-up is difficult to predict. The projected take-up for 2025-26 is higher than in 2024-25 when the gross spend in this budget area was £16.326 million. This is partly due to the increase in council tax in 2025-26 of 4.5%, plus work undertaken by the Benefits Team to ensure citizens are aware of and claiming the benefits they are entitled to.

#### Other Council wide budgets

- The projected under spend of £6.326 million has improved from the £5.381 projected under spend at quarter 2. The main areas contributing to this projected under spend are:-
  - During quarter 2 Welsh Government provided a grant of £521,736 towards the teachers' pay award 2025-26 that was not anticipated at budget setting.
  - During quarter 2 allocation of funding retained centrally in respect of National Joint Council (NJC) pay awards was vired to directorate and school budgets. The confirmed pay award was lower than provided for. The ongoing uncertainty over future pay awards means that it is likely that the provision set aside in the MTFS for 2026-27 will need to be supplemented by any funding not committed from the central pay budget this financial year.
  - Inflation rates have fluctuated since the budget was set – CPI was 2.8% when the budget was set in February 2025, increasing to 4.1% in September 2025, then falling to 3.2% in November 2025. The majority of the budget estimated for price inflation is retained centrally within council wide budgets and allocated to directorates/schools as further information is known about specific contractual price increases – CPI allocations during quarter 3 can be found in paragraph 3.1.10. There is ongoing uncertainty on energy cost increases in 2026-27 and the general trajectory of CPI, therefore it is likely that the provision set aside in the MTFS for 2026-27 will need to be supplemented by any funding not committed from the price inflation budget this year.
  - There is also a projected reduction in corporate support required to fund redundancy costs as there are fewer staffing-related MTFS proposals for 2025-26.

### **3.4 Earmarked Reserves**

3.4.1 The cumulative revenue draw down by directorates to date is £1.206 million as shown in **Table 4** below. The majority of the draw down from earmarked reserves takes place in the later stages of the financial year, especially on capital and grant funded schemes. In addition, school balances are not adjusted until the year end – an overall draw down in-year of £4.974 million from school balances is currently projected, which would continue to leave a negative balance to be managed by the Council.

**Table 4 –Revenue Earmarked Reserves (Excluding Council Fund) – Quarter 3**

Opening Balance 01 Apr 25	Reserve	Net Additions/ Reclassification	Draw-down	Unwound	Closing Balance 31 Dec 25
£'000		£'000	£'000	£'000	£'000
<b>Corporate Reserves:</b>					
2,290	Asset Management Reserves	-	(209)	-	2,081
1,830	Major Claims & Insurance Reserves	-	-	-	1,830
1,892	Service Reconfiguration	-	-	-	1,892
2,294	Change Management/Digital Transformation	(264)	(184)	-	1,846
500	Economic and Future Resilience Fund	-	-	-	500
3,179	Other Corporate Reserves	-	-	-	3,179
<b>11,985</b>	<b>Total Corporate Reserves</b>	<b>(264)</b>	<b>(393)</b>	<b>-</b>	<b>11,328</b>
<b>Directorate Reserves:</b>					
1,919	Education & Family Support	-	(38)	-	1,881
1,856	Social Services & Wellbeing	-	(389)	-	1,467
1,835	Communities	-	(182)	(51)	1,602
1,966	Chief Executives	347	(123)	-	2,190
<b>7,576</b>	<b>Total Directorate Reserves</b>	<b>347</b>	<b>(732)</b>	<b>(51)</b>	<b>7,140</b>
<b>Equalisation &amp; Grant Reserves:</b>					
316	Education & Family Support	-	-	-	316
47	Social Services & Wellbeing	-	-	-	47
2,478	Communities	(355)	(81)	-	2,042
47	Chief Executives	310	-	-	357
<b>2,888</b>	<b>Equalisation &amp; Grant Reserves:</b>	<b>(45)</b>	<b>(81)</b>	<b>-</b>	<b>2,762</b>
(619)	School Balances	-	-	-	(619)
<b>21,830</b>	<b>TOTAL RESERVES</b>	<b>38</b>	<b>(1,206)</b>	<b>(51)</b>	<b>20,611</b>

3.4.2 In addition to the revenue reserves in **Table 4**, there are currently £46.083 million of other earmarked reserves funding schemes within the capital programme.

#### **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 and Nature 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. Recommendations**

9.1 Cabinet is recommended to:

- note the projected revenue position for 2025-26

**Background documents:** Individual Directorate Monitoring Reports

## PRIOR YEAR BUDGET REDUCTIONS CARRIED FORWARD INTO 2025-26

Ref.	Budget Reduction Proposal	Original Reduction and RAG £000	Total amount of saving likely to be achieved in 2025-26 £000	Reason why not achievable	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

EDFS9 (2024-25)	Cessation of Adult Community Learning (ACL) provision	149	149	The outcome of the consultation process for the cessation of the ACL service was finalised in quarter 3 of 2024-25.	None required - saving will be made in full in 2025-26
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	142	0	Saving not met in 2024-25 due to the overall increase in pupils needing the service	A new Team Lead started on 1 September 2025, however due to staff absences the review has been delayed. It is anticipated to commence in quarter 4 and further updates to Cabinet will be provided as the review progresses.
<b>Total Education, Early Years and Young People</b>		<b>291</b>	<b>149</b>		

## SOCIAL SERVICES AND WELLBEING

SSW7 (2024-25)	Review opportunities to amend the current energy payment arrangements for the leisure contract	45	45	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.	None required - alternative saving identified and has been achieved in 2025-26
SSW13 (2024-25)	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	360	65	Cabinet report in May 2024 approved reductions of £65K, along with public engagement over how future savings can be achieved. 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 saving of the remaining £295,000 will be covered by maximising grant funding opportunities in 2025-26. However a long term plan to achieve the additional £295,000 needs to be explored for the saving to be met in 2026-27. Public engagement will be undertaken with a view of what does long term sustainable cultural services look like.
SSW17 (2024-25)	BCBC consider efficiency savings from Third Sector Contracts - bereavement services	5	5	Notice was served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
SSW18 (2024-25)	BCBC consider efficiency savings from Third Sector Contracts - dementia services	57	57	Notice was served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
SSW22 (2024-25)	BCBC consider efficiency savings from Third Sector Contracts - substance misuse services	34	34	Notice was served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
<b>Total Social Services and Wellbeing Directorate</b>		<b>501</b>	<b>206</b>		

## COMMUNITIES

COM2 (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. As the exit terms of the lease are still being worked through the saving has not been achieved. Once these have been finalised, the full saving will be made.	The service have met the shortfall in the saving through alternative one off efficiencies in 2025-26 to deliver a balanced budget position on Waste Services.
COM4 (2022-23)	Remove Business in Focus from running Enterprise Centres in Bridgend	20	5	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.	Savings have been made elsewhere in Corporate Landlord, mainly due to staff vacancies.
COM5 (2022-23)	Commercially let a wing of Ravens court to a partner organisation or business	50	50	Building was not commercially let during 2024-25. Sale of the freehold took place in the final quarter of 2024-25.	Full saving is anticipated to be met in 2025-26
COM2 (2023-24)	Charging Blue Badge Holders for parking	40	0	The Traffic and Transport Team are progressing with the order making process and have carried out an initial engagement on the proposal which is currently being evaluated prior to progressing.	Savings have been made elsewhere within Transportation Services to deliver a balanced budget position, in particular Car Parking Services.
COM3 (2023-24)	Commercially let two wings of Ravens court to a partner organisation or business	120	120	Building was not commercially let during 2024-25. Sale of the freehold took place in the final quarter of 2024-25.	Full saving is anticipated to be met in 2025-26
COM1 (2024-25)	Reduction in staff mileage budgets	34	34	Achieved 58.8% of the proposed saving in 2024-25 - saving increased as year progressed.	Full saving is anticipated to be met in 2025-26
COM10 (2024-25)	Review of Porthcawl Marina berthing fees with a view to it operating on a full cost recovery basis	32	23	The shortfall against the savings target is due to one-off costs incurred to cover sickness within the service.	Staff vacancies across the wider service for Economy, Natural Resources & Sustainability department have resulted in a break even service.

Ref.	Budget Reduction Proposal	Original Reduction and RAG £000	Total amount of saving likely to be achieved in 2025-26 £000	Reason why not achievable	Proposed Action in 2025-26 to achieve
COM14 (2024-25)	Office Rationalisation to include closing Raven's Court and the Innovation Centre and sharing accommodation in Civic Offices with the MASH and SWP.	73	73	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.	Full saving is anticipated to be met in 2025-26
COM28 (2024-25)	Letting of former Woodmat Property, Brynmenyn Estate	35	9	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, therefore part-year saving should be achieved. Savings have been made elsewhere in Corporate Landlord, mainly due to staff vacancies, to mitigate the shortfall.
	<b>Total Communities Directorate</b>	<b>464</b>	<b>314</b>		

### Chief Executives

CEX8 (2024-25)	Charging the public for Pest Control Services	67	43	Due to reduced uptake of the service the saving was only partly achieved in 2024-25.	Due to the continued reduced uptake of the domestic pest control service, the decision was taken to cease the provision of this service by BCBC from 31st October 2025 therefore this saving will not be achieved in full in 2025-26. Partnership budgets will be identifying alternative budgets as part of the 2026-27 budget setting process to mitigate the underlying net budget of £3,950 for the service.
CEX12 (2024-25)	Increased income from Registrars' Ceremonies	43	43	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 first half of the year has seen an increase in bookings.
CEX13 (2024-25)	Restructure of Legal Services	154	154	Saving partly achieved in 2024-25 due to the timing of implementation of the Legal restructure	The restructure of Legal Services has been completed therefore the savings will be made in full from 2025-26.
CEX14 (2024-25)	Reconfiguration of Business Support	160	160	Saving partly achieved in 2024-25 due to the timing of implementation of the Business Support restructure	The restructure of Business Support has been completed therefore the savings will be made in full from 2025-26.
CEX15 (2024-25)	Increase income generated from legal fees for property transactions, S106 Agreements and Highway Agreements	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	The Draft Medium Term Financial Strategy for 2026-27 to 2029-30 includes a budget pressure of £58,000 to mitigate the shortfall in income generated from legal fees from property transactions, S106 Agreements and Highway Agreements.
CEX16 (2024-25)	Restructure of HR Service	289	289	Saving partly achieved in 2024-25 due to the timing of implementation of the HR restructure	The restructure of HR has been completed therefore the savings will be made in full from 2025-26.
CEX17 (2024-25)	Household Canvas - Reduction / Limited Canvass Door Knocking	9	0	Saving not achieved due to increased costs associated with canvassing.	Service area will be identifying alternative budgets as part of the 2026-27 budget setting process to mitigate the shortfall on this budget reduction proposal.
CEX19 (2024-25)	Restructure of Democratic Services	96	96	Saving partly achieved in 2024-25 due to the timing of implementation of the Democratic Services restructure	The restructure of Democratic Services has been completed therefore the savings will be made in full from 2025-26.
CEX20 (2024-25)	Restructure of Corporate Policy and Public Affairs Team	45	45	Saving partly achieved in 2024-25 due to the timing of implementation of the Corporate Policy and Public Affairs restructure	The restructure of Corporate Policy and Public Affairs has been completed therefore the savings will be made in full from 2025-26.
CEX22 (2024-25)	Review of ICT Services	398	295	Saving not met in full due to the timing of re-procurement exercise on telephony budgets across the Council	The service will still look to find efficiencies in the current year. In the longer term work is being done to look at options for funding and supporting the digital transformation in the Authority.
CEX23 (2024-25)	Review the provision of Partnerships and Customer Services	216	216	Saving partly achieved in 2024-25 due to delays in confirmation of alternative external funding towards 2 posts.	Confirmation of funding has been finalised, therefore full saving anticipated to be made in 2025-26.
CEX25 (2024-25)	Staff savings from Finance senior management team	70	0	Shortfall in savings target due to failure to implement proposed Finance senior management restructure.	The Draft Medium Term Financial Strategy for 2026-27 to 2029-30 includes a budget pressure of £70,000 to reinstate this budget reduction proposal as the restructure was consulted on but it did not proceed.
	<b>Total Chief Executives Directorate</b>	<b>1,567</b>	<b>1,341</b>		

<b>GRAND TOTAL OUTSTANDING REDUCTIONS</b>	<b>2,823</b>	<b>2,010</b>	
<b>REDUCTIONS SHORTFALL</b>		<b>813</b>	

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Proposed 2025-26 £'000	Value achieved to date 2025-26 £'000	Value likely to be achieved 2025-26 £'000	Reason why not likely to be achievable						
Page 217												
<b>RAG STATUS KEY</b> <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td style="background-color: #FF0000; text-align: center;">RED</td><td>Not likely to be achieved <b>at all</b> in this financial year or less than 25%.</td></tr> <tr> <td style="background-color: #FFD700; text-align: center;">AMBER</td><td>Reduction not likely to be achieved in full in financial year but greater than 25%</td></tr> <tr> <td style="background-color: #90EE90; text-align: center;">GREEN</td><td>Reduction likely to be achieved in full</td></tr> </table>							RED	Not likely to be achieved <b>at all</b> 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
RED	Not likely to be achieved <b>at all</b> in this financial year or less than 25%.											
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GREEN	Reduction likely to be achieved in full											
<b>EDUCATION, EARLY YEARS AND YOUNG PEOPLE</b>												
<b>CENTRAL EDUCATION, EARLY YEARS AND YOUNG PEOPLE</b>												
EEYYP1	Cessation of the Meals-at-Home Service	While there could be a significant redundancy cost, redeployment options could be explored to mitigate this risk. A public consultation would be required prior to determination by Cabinet.	56	0	0	The service has now terminated. There are some residual costs in 2025-26 but full saving should be achieved in 2026-27.						
EEYYP2	Review of Home to School Transport	While transport for Nursery children is non-statutory, if this were to be removed, there could be negative impact on pupils attending Welsh-medium and faith school nursery settings in particular although numbers are relatively low (<100). Home-to-school transport for Post-16 students is non-statutory. This could result in an increased number of young people not in education, employment or training. These cuts could impact on school attendance.	675	490	675	The new Home-to-School Transport Policy was implemented on 1 September 2025. The efficiency savings are ongoing and contracts have been adjusted to take into account the change of eligibility for pupils.						
EEYYP3	Reduction in Counselling services	Should a decision be made to reduce counselling services this would have a negative impact on the wellbeing of children and young people. A reduction in this area would limit the access to support for children and young people.	50	50	50	Full saving should be achieved in 2025-26						
EEYYP4	Reduction in Early Years and Childcare	Some functions would need to be removed from the team, for example, the ability to <ul style="list-style-type: none"> <li>• quality assure childcare providers in the community (with associated safeguarding risks);</li> <li>• complete the statutory childcare sufficiency assessments and associated statutory work; and</li> <li>• support and develop childcare within the community.</li> </ul>	90	68	90	Full saving should be achieved in 2025-26						

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Proposed 2025-26 £'000	Value achieved to date 2025-26 £'000	Value likely to be achieved 2025-26 £'000	Reason why not likely to be achievable
Page 218	EEYYP5 Reduction in Strategy, Performance and Support Group	<p>This proposed reduction relates to a number of posts in the Strategy, Performance and Support Group.</p> <p>The reduction will present a significant impact (and associated serious risk) in the implementation of the Education, Early Years and Young People Directorate's main management information systems. This reduction will limit the way in which the directorate is able to record, manage and report on sensitive data relating to vulnerable children.</p> <p>This reduction would also impact on the local authority's ability to dispense its statutory home-to-school transport duties. This reduction will mean that our capacity to maintain procurement and contract procedure responsibilities will be diminished and that the School Transport Team's ability to respond to complaints and issues will be more limited.</p>	146	0	25	The consultation with staff on the restructure of the Strategy, Performance and Support Group has now concluded and the new structure will be implemented from 5 January 2026. Full savings will be achieved from 2026-2027
EEYYP6	Reduction in Pupil Services	<p>There would be a significant risk to the local authority being able to ensure school admission arrangements are in place and school places are offered in line with national legislation and local policy arrangements. The child employment function would likely need to cease, to compensate for the reduced capacity within the team. Furthermore, the team would not be able to have oversight and administer applications for discretionary transport which would likely leave the local authority open to legal challenge.</p>	35	0	6	The consultation with staff on the restructure of the Strategy, Performance and Support Group has now concluded and the new structure will be implemented from 5 January 2026. Full savings will be achieved from 2026-2027
EEYYP7	Reduction in the Corporate Health and Safety Unit	<p>The local authority has, within the last few years, provided significant additional revenue budget to expand the number of Health and Safety advisors to support the local authority in delivering its functions safely. The Corporate Health and Safety Unit (CHSU) ensures that both staff and the public are kept safe where they are affected by the local authority's undertakings.</p> <ul style="list-style-type: none"> <li>• The team's ability to promote a positive health and safety culture would likely be compromised.</li> <li>• Significant reduction in proactive work and active monitoring, mentoring and coaching for the "responsible person"</li> <li>• Significant increased pressure on managers at all levels with more limited advice available and less time from the CHSU to support</li> <li>• Significant increased reactive work.</li> <li>• Inability to offer training without support from the private sector (at cost)</li> <li>• Potential increase in insurance cost, and the cost to services to address failings in general, or which has been identified by the HSE (for example, fees for intervention)</li> <li>• Increased in costs to cover work would normally be completed by the CHSU but will likely require contractors to provide</li> <li>• Potential serious failings under the current health and safety legislation, potentially leading to prosecution (corporate and personal liability for senior officers, in particular Corporate Management Board)</li> <li>• A poorer health and safety culture across the organisation in general</li> <li>• Poorer health and safety systems</li> <li>• Increase level of criticism from services users, members of public and elected members</li> </ul> <p>There are significant health and safety risks that the current team has limited capacity to address that could potentially mean regulatory interventions by the HSE. There have been several HSE interventions within the last two years. A reduction in the human resources would add exponentially to the risk of the local authority failing its health and safety duties, where the potential for intervention by the HSE, prosecutions and fines would significantly outweigh any MTFS efficiency.</p>	76	0	13	The consultation with staff on the restructure of the Strategy, Performance and Support Group has now concluded and the new structure will be implemented from 5 January 2026. Full savings will be achieved from 2026-2027

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Proposed 2025-26 £'000	Value achieved to date 2025-26 £'000	Value likely to be achieved 2025-26 £'000	Reason why not likely to be achievable
Page 219						
EEYYP8	Reduction in Business Support	<p>The directorate's centralised support function is responsible for providing business support to teams and to the central EDSU function that is responsible for all complaints, reports (for example Cabinet), statutory meeting support such as SACRE, member referrals, FOI requests, subject access requests, managing referral and inputting information into the directorate's central management information systems. A reduction of staff would mean there would likely be delays in input of referrals which would increase waiting times for children and families to receive support from family support services. Delayed communication with schools following receipt of Police Protection Notifications (PPNs) involving pupils within Bridgend schools. There would be an impact on the Youth Justice Service's (JYS) statutory requirements, for example notification of overnight arrests / custody, invites to Bureau and capturing data in relation to education provision for children open to YJS. This could also affect statutory Youth Justice Board key performance indicators. Freedom of information and subject access requests would likely not meet statutory timelines and there would be delays in Cabinet and scrutiny reports being progressed, as EDSU support the approvals process. Delegated power administration support could be delayed and could miss call-in timescales. There would likely be poor customer service to complainants who raise complaints via EDSU. This could escalate to more complaints and member referrals. There would likely be poorer customer service to children, young people and families who access any service within the Education, Early Years and Young People portfolio, including Learner Support, School Support, Pupil Services, Early Years and Young People and School Admissions. Inaccurate or missing data could contribute to General Data Protection Regulation (GDPR) breaches, for example, if an address change has not been updated in a timely manner. Lastly, there will be significantly increased pressure on practitioners, senior practitioners and team managers.</p>	93	0	15	The consultation with staff on the restructure of the Strategy, Performance and Support Group has now concluded and the new structure will be implemented from 5 January 2026. Full savings will be achieved from 2026-2027
EEYYP9	Reduction of staff in Additional Learning Needs (ALN) Statutory Team	<p>Failure to meet the Welsh Government deadline for ALN Implementation Plan 2023-2025. The risk of failure to determine, capture, and disseminate processes relating to the ALN Code and the Education Tribunal in Wales and comply with statutory duties of the local authority. This includes individual development plans (IDP) requirements of the ALNET Act 2018.</p>	44	44	44	Full saving should be achieved in 2025-26
EEYYP10	Reduction in Education Other Than At Schools (EOTAS) support	<p>Increasing demand and waiting list for specialist support at The Bridge Alternative Provision has resulted in a higher need for bespoke timetables. If there is no lead post overseeing this area the risk appropriate education not provided to those pupils who cannot attend mainstream or special school the local authority would not be fulfilling its statutory duty.</p> <p>Capacity of staff to identify appropriate accredited, vocational packages to meet individual need will be reduced resulting in an increase in number of pupils who are on a waiting list for suitable education.</p> <p>Delays in meeting the needs of learners and significant placement breakdowns will lead to an increase in out of authority specialist placements requested at significant additional cost.</p> <p>Further challenge placed on mainstream schools to identify and agree alternative packages on a case by case basis at significant additional cost.</p> <p>Pupils would not receive the support they require resulting in lower exam outcomes and an increase in those Not in Employment, Education or Training (NEET) post statutory school age. Possible increase in number of permanent exclusions from mainstream schools.</p>	75	0	43	Shortfall in savings due to the timing of the restructure. Saving will be made in full in 2026-27.

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

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Page 220						
EEYYP11	Reduction in contribution to Central South Consortium	<p>Depending on where this funding is cut (either from the grant received by the local authority and immediately passported to Central South Consortium) or from the funding allocated for Principal / Improvement Partners it will either:</p> <ul style="list-style-type: none"> <li>•Reduce curriculum reform support and professional learning and leadership support at a time when the new curriculum is being extended to examination classes; or</li> <li>•Result in a decrease in the number of improvement partners (IP) to work in partnership with school leaders, staff and governing bodies. Each IP would be required to work with more schools with less time in each school. This would mean a reduction in the support available to schools to support pre-inspection and post inspection planning and a reduction in the time available to support senior leader recruitment processes.</li> </ul> <p>It will also coincide with anticipated changes as a result of the Middle Tier Review which may create additional work / responsibility for headteachers and senior leaders in relation to school improvement functions without the expected funds to support any such transition.</p>	88	88	88	Full saving should be achieved in 2025-26
<b>Total Education, Early Years and Young People</b>			<b>1,428</b>	<b>740</b>	<b>1,049</b>	

### SCHOOLS

SCH1	Efficiency savings against School Delegated Budgets - 1% for 2025-26 and 1% thereafter.	<p>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:</p> <p>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.</p>	1,186	1,186	1,186	Savings achieved due to overall reduction in Individual Schools Budget (ISB). However, reduced budgets have resulted in quarter 3 total projected deficit balances for schools at year end in excess of £5.593m.
<b>Total Schools</b>			<b>1,186</b>	<b>1,186</b>	<b>1,186</b>	

Total Education, Early Years and Young People Directorate	2,614	1,926	2,235
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## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

Ref. Page	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Proposed 2025-26 £'000	Value achieved to date 2025-26 £'000	Value likely to be achieved 2025-26 £'000	Reason why not likely to be achievable
<b>SOCIAL SERVICES AND WELLBEING</b>						
1 SSW2	Redevelop the indoor bowls arena space and explore redevelopment for other purposes that offer increased income generation	The operation of the indoor bowls hall at Bridgend Life Centre generates operating costs that are difficult to cover based on the seasonal usage by the indoor bowls club. Any changes to indoor bowling would not be popular and may have a negative impact on the Council's wellbeing goals. The development of the wellbeing hub inside the bowls hall has improved usage by downsizing the number of bowling rinks already. With investment there may be possibilities for seasonal increased income generation. Potential need for alternative community venue for indoor bowls. Feasibility study would be required during 2024-25.	10	0	0	The feasibility study and capital works linked to external funding are expected to be completed in quarter 4. The savings will therefore not be delivered in 2025-26 and updates will be provided in the 2026-27 monitoring reports.
SSW4	Consider the transition of currently shared facilities at five school sites (Dual Use Assets), to whole school operation in line with many primary and secondary schools across BCBC	BCBC supports community access of school assets including Pencoed sports centre, Brackla sports centre, Ysgol Bryn Castell, Porthcawl sports hall and Parc Dderwen 3G pitch. The sites are busy with 110 organisations utilising the different spaces available. These are partnership arrangements with schools including cost sharing and often have linked to external funding support. The proposal has been to increase prices for hirers to offset increases in staffing and premises costs / school contributions whilst also creating a saving from increased income generation. There are considerable numbers of junior groups and activities within the usage data for the sites and targeted population groups also. If achieved the proposal will supports sustainability via maximising value for existing assets beyond the school day for community benefit. In particular the model links to 21st century schools and Welsh government aspiration for community use and connection beyond the school day. The school benefit during the day and community beyond, the main risks would be the school not having the opportunity to use the asset outside school hours, having a negative impact on community opportunities.	71	53	71	Full saving should be achieved in 2025-26
SSW5	Staffing restructure within Prevention and Wellbeing Services	The Prevention and Wellbeing service would be reliant on external grant funding to support its service. If grant funding ceases there will be no meaningful prevention and wellbeing offer in Bridgend significantly increasing pressure on statutory services. There will be a reduction in the number of staff by 3, redundancy costs will need to be funded. In order to achieve this the service is in the process of redesigning to ensure that it is fit for purpose with clear functions and objectives established which will mitigate any significant impact and risks.	147	147	147	Full saving should be achieved in 2025-26
SSW6	Increase in income charges by increasing standard charges by 10 % across all non residential services	Review of the service pricing model and increasing unit costs for all non residential services with a view to generating additional income. Based on unit cost increase of 10%. 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. In terms of flat rate charges such as Transport and Meals, no additional income can be generated under the current regulations.	100	75	100	Full saving should be achieved in 2025-26

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

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Page 222						
SSW7	Implementation of the Home remodelling programme across adult services	The support at home remodelling programme across whole of adult services has determined that the service will move to a locality based delivery model which will result in non care staffing savings of £198k. This will result in 5 staff members being made redundant. The model aims to maximise reablement and short-term capacity to support hospital discharge and avoiding hospital admission. The service has been working towards increasing those individuals who go through the short-term services to ensure we maximise independence before we commission long term care packages our current performance is that 53.98% of individuals who completed a package of reablement during quarter 1 2024-25 had no ongoing service need. In 2023-24 38.6% of people had a short term service prior to have a long term package, the service has been working towards increasing this number to 80% of people, in July the figure had increased to 60% of people who had a short term service prior to have a long term package people. To be able to achieve this target the service will no longer be providing long term packages of care in the main to older people, so all future long term packages would be commissioned via independent providers. This should reduce the overall support at home spending levels by £300k.	198	0	198	Full saving should be achieved in 2025-26
SSW8	Reduction in provision of number of Supported Living Accommodation units	Close one supported living accommodation. Suitable alternative provision would need to be identified. Achieving these savings is dependent on tenant with rights being agreeable to moving to an alternative provision. Review the waking nights expenditure.	190	0	0	It has been determined that this saving proposal is no longer deliverable and work is underway by the service to identify alternative budgets for this to be offset against.
SSW9	Review of Caswell Clinic social work budget (clinic based at Glanrhdy Hospital)	BCBC host the regional social work team based in the Caswell clinic. All costs are reimbursed so no impact on this small budget reduction	3	3	3	Full saving should be achieved in 2025-26
SSW10	Apply 4% vacancy factor to social work teams and increase the vacancy factor on non frontline staff from 3% to 4%	In 2024-25 a vacancy factor of 3% was applied to non frontline teams in Social Services and Wellbeing. Care worker and social work posts were excluded due to an assessment of risk that all posts need. There is now greater stability in social work teams which means an assessment of risk means that the vacancy factor can be applied in these teams in adults and children's social care. This will require the step down of agency by the end of the financial year, and it is highly improbable there will be no vacant posts covered by agency due to safeguarding reasons meaning achievement of the full 3% represents a significant risk.	697	523	697	Full saving should be achieved in 2025-26
SSW11	Reduction of Social Care Workforce Development Partnership (SCWDP) spend.	External training courses / conferences to be supported only where there is an identified need that cannot be met by in-house resources. Use of internal staff to facilitate training workshops. External trainers bring specialist knowledge and skills that internal trainers could not replicate so the impact on statutory training essential to regulatory requirements will need to be closely monitored.	50	37	50	Full saving should be achieved in 2025-26

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

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Page 223							
	SSW12	<p>The commissioning team is at full capacity with all colleagues on permanent contracts, so any MTFS saving / restructure will result in redundancy costs. The team are also driving forward key transformational change linked to MTFS savings, so any reduction on capacity will impact our ability to deliver targeted savings elsewhere in the MTFS. There is also a risk that we will not be able to meet essential requirements of the newly implemented WG Code of Practice for commissioning care and support, nor our own internal Contract Procedure Rules, where there is a risk that tenders cannot be undertaken within required timescales.</p> <p>Business support has been restructured to provide a support office model which ensures that statutory minutes linked to safeguarding are completed and distributed in a timely manner and to ensure social work tasks are carried out by support officers, thus maximising the amount of time that social workers spend with children, adults, families and carers. Reduction in this resource will increase the administrative burden on social work staff. Any reduction in the performance team will impact on the ability to complete statutory performance returns. There is a high probability reductions in these teams will result in compulsory redundancies.</p>	129	129	129	Full saving should be achieved in 2025-26	
	SSW13	Removal of Safeguarding capacity	Would result in a compulsory redundancy situation. Corporate safeguarding is a statutory duty having no dedicated resource, there is risk of criticism that people will come to harm through no one being available to drive the implementation of safeguarding across the Council. There is also a significant risk of criticism from regulators.	57	0	0	Whilst it was considered at quarter 2 that this saving would be made in full, recent reviews across Wales have demonstrated the need to strengthen corporate safeguarding responsibilities rather than reducing them. A further review of the post will be undertaken and the savings identified will need to be made elsewhere within the service.
	SSW14	Reduction in staff within Children's Services	This proposal is to reduce Independent Reviewing Officer numbers by 1 linked to the reduction in the child protection register. This is currently achievable whilst maintaining reasonable caseloads but there is a risk there will be insufficient workforce if the numbers of children subject to registration increase again. It is also proposed that social work assistants in IAA undertake young carers assessments meaning that the Young Carers Worker would be redundant. Finally a review of senior management arrangements can result in some savings. This will need to be monitored closely given the CIW serious concerns in August 2022 which included concerns at management oversight arrangements.	50	50	50	Full saving should be achieved in 2025-26
	SSW15	Reduction in family group conferencing service contract value. Due to the continued implementation of signs of safety (including family network meetings) and new ways of working less families will need to be referred to the family group conferencing service.	The risks are minimal as we have already begun to lower our usage with the full implementation of Signs of Safety. We have set an expectation that family meetings will be run by Social Workers until it is felt independence from the LA is required. We currently have the criteria: children who have been subject to Child Protection Register (CPR) for longer than three months or subject to Public Law Outline (PLO). We could reduce this to only include those children who become subject to pre-proceedings PLO or are in court.	60	60	60	Full saving should be achieved in 2025-26
	SSW16	Removal of Corporate Parenting Events budget	Low impact as utilising "Just Giving" to raise funds to support the Corporate Parent responsibilities of this Council and partners.	5	5	5	Full saving should be achieved in 2025-26

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

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Page 224	SSW17 Management efficiencies	A review of senior management in adult and children's social care will be undertaken to identify efficiencies whilst ensuring there continues to be effective leadership and management capacity which is key to delivering the changes and transformation required to deliver the rest of the MTFS savings and to retain the confidence of regulators who in 2022 had serious concerns regarding management oversight in children's social care and regulated care services	50	50	50	Full saving should be achieved in 2025-26
	<b>Total Social Services and Wellbeing</b>		<b>1,817</b>	<b>1,132</b>	<b>1,560</b>	

### 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.	32	6	18	There was a similar budget reduction proposal in 2024-25 which was not met in full and has been carried forward into 2025-26 (see COM1 Appendix 1). The historic target will be met in 2025-26, however it is anticipated there will a shortfall against the in-year proposal. Alternative budgets will have to be identified if the value likely to be achieved does not improve in future revenue monitoring reports.
COM2	Review of cleaning specifications and frequencies on BCBC Operational assets.	Will impact cleaning standards and visibility of cleaning frequencies but change is considered feasible. Will need to review cleaning staff numbers and potential for redundancies however aim will be to implement changes through staff redeployment and recruitment changes across the wider cleaning contract thus avoiding redundancy issues.	35	35	35	Full saving should be achieved in 2025-26
COM3	Further review of cyclical servicing and maintenance contracts dialling back maintenance items to safety critical and statutory compliance only.	Reduction of cyclical maintenance activity counter productive for long term asset operation. Potential for reduction in Business Support staff as a result of the reduction in cyclical orders although savings to Business Support already form part of current MTFS.	45	0	0	Due to ongoing pressures on the property revenue maintenance budgets the budget reduction proposal is unlikely to be achieved in 2025-26. However, savings from staff vacancies in Corporate Landlord have supported the shortfall against this specific proposal.
COM4	Increase income across the commercial property portfolio	Change will take time to implement and require additional surveyor resource over time.	15	0	0	Due to staff vacancies the additional income target will not be met in 2025-26. However savings from the staff vacancies in Corporate Landlord have supported the shortfall against this specific proposal.
COM5	Review Legionella and Asbestos officer structure.	Savings identify the option of creating a newly combined legionella and asbestos team reducing the overall staffing budget	10	10	10	Full saving should be achieved in 2025-26
COM6	Removal of funding from Southern Wales Tourism Group	Removal of BCBC contribution of funding from external tourism group. Will impact on reduction in marketing activities for BCBC.	9	9	9	Full saving should be achieved in 2025-26
COM7	Further reduction in Porthcawl Programme budget	Further reduction in Porthcawl Programme budget - reduction excluding post and minimal development spend.	35	35	35	Full saving should be achieved in 2025-26

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

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Page 225	COM8 Increase bulky waste charges from £30 for 3 items to £35	Potential increase in fly tipping. 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	3	10	Full saving should be achieved in 2025-26
COM9	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. This will be the second year that bereavement charges have increased. 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. This has been reflected in the target income.	100	0	100	Full saving should be achieved in 2025-26
COM10	Reduction in the size of the waste enforcement team.	Reduction in staff who undertake enforcement activities relating to waste. There is a risk that the ability to react to issues will be reduced.	156	38	119	Shortfall in savings due to the timing of the restructure. Saving will be made in full in 2026-27.
COM11	Commercially let Pandy Depot	Would require existing BCBC archive storage to be condensed or relocated to other location and take time to ready for commercial letting. Reduce the amount of depot facilities for BCBC operations. Will require capital to ready for letting. Full savings unlikely until 2025-26, but partial savings are a possibility in 2024-25.	50	0	0	Ongoing opportunities being sought to achieve this budget reduction proposal, but not agreed by end of quarter 3. Savings on staff vacancies across Corporate Landlord have mitigated the shortfall on this proposal.
COM12	Stop bi-annual supply of blue refuse sacks to all residents.	This saving is agreed & will be implemented from April 2025. This would mean residents would have to provide their own bags for containment of refuse. Likely to be an unpopular change for residents who currently have these delivered with food waste liners. The amount of the saving is now slightly reduced in 2025-26 because of the contractors expenditure on the bags already ordered but will be realised in full from 2026-27.	220	220	220	Full saving should be achieved in 2025-26
<b>Total Communities Directorate</b>			<b>717</b>	<b>356</b>	<b>556</b>	

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

Ref. Page	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Proposed 2025-26 £'000	Value achieved to date 2025-26 £'000	Value likely to be achieved 2025-26 £'000	Reason why not likely to be achievable
<b>CHIEF EXECUTIVES</b>						
96	CEX1	Remove vacant grade 6 post (0.5) - Democratic Services	20	20	20	Full saving should be achieved in 2025-26
	CEX2	Reduction in payment to Shared Regulatory Services (SRS)	153	153	153	Full saving should be achieved in 2025-26
	CEX3	Review of the current Learning and Development provision	84	63	84	Full saving should be achieved in 2025-26
	CEX4	Reduction in Corporate Apprenticeship budget - 15%	58	58	58	Full saving should be achieved in 2025-26
	CEX5	Review support capacity across finance	31	0	0	Shortfall in savings target due to timing of implementation of restructure. Options being considered with further updates to be provided to Cabinet in future monitoring reports.
	CEX7	Review the capacity within the customer services team.	67	50	67	Full saving should be achieved in 2025-26
	CEX8	Extend further the use of Houses in Multiple Occupation to provide temporary accommodation for single homeless individuals	120	90	120	Full saving should be achieved in 2025-26
	CEX9	Management restructure across the Chief Executive's Directorate	77	77	77	Full saving should be achieved in 2025-26
	CEX10	Restructure the ICT service	78	0	0	Shortfall in savings target due to timing of implementation of restructure. Saving will be achieved in full by 2026-27.
	<b>Total Chief Executive's Directorate</b>		<b>688</b>	<b>511</b>	<b>579</b>	
<b>CORPORATE / COUNCIL WIDE</b>						
	CW1	Change the Council's Minimum Revenue Provision (MRP) Policy from a straight line to annuity method. The MRP is the charge to revenue made in respect of paying off the principal sum of the borrowing undertaken to finance the capital programme	The change in policy will improve the Council's ability to make prudent provision as it helps to distribute the MRP more fairly when factoring that the value of money decreases with time due to its earning potential. The annuity method provides a fairer charge than equal instalments as it takes account of the time value of money.	1,000	1,000	1,000
						Full saving should be achieved in 2025-26

## Budget Reduction Proposals 2025-26 to 2028-29

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Well-being of Future Generations Act	Proposed 2025-26 £'000	Value achieved to date 2025-26 £'000	Value likely to be achieved 2025-26 £'000	Reason why not likely to be achievable	
Page 227	CW2	Removal of uncommitted funding set aside in the MTFS 2024-28 towards emerging budget pressures and as a contingency against non-deliverability of budget reduction proposals. The original allocations were £550k and £1.08 million respectively. Only £87k has been allocated during the year resulting in a balance of £1.543 million as a contribution to continuing budget pressures	There will be no negative impact on service delivery, these budgets were set aside in 2024-25 to meet new and continuing budget pressures. A number of these are recurring and this funding will help to reduce overspends in future years. It does mean, however, that there is less headroom corporately to deal with unexpected financial pressures going forward.	1,543	1,543	1,543	Full saving should be achieved in 2025-26
<b>Total Corporate / Council Wide</b>			<b>2,543</b>	<b>2,543</b>	<b>2,543</b>		

GRAND TOTAL REDUCTIONS		8,379	6,468	7,473	
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REDUCTION SHORTFALL				906	
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3,722	3,382	5,930
2,167	2,131	893
2,490	2,866	1,556
8,379	8,379	8,379

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BRIDGEND COUNTY BOROUGH COUNCIL	Budget 2025-26			Projected Outturn	Projected Variance Over/(under) budget	% Variance
	Expenditure Budget £'000	Income Budget £'000	Net Budget £'000			
<b>EDUCATION, EARLY YEARS AND YOUNG PEOPLE</b>						
School Delegated Budgets	149,988	(23,447)	126,541	126,541	-	0.0%
Inclusion Group	9,963	(1,147)	8,816	9,119	303	3.4%
Early Years and Young People	3,479	(545)	2,934	2,845	(89)	-3.0%
Strategic Performance and Support	18,029	(4,265)	13,764	13,020	(744)	-5.4%
Schools Support	1,710	(830)	880	913	33	3.8%
Sustainable Communities For Learning	4,039	(3)	4,036	4,029	(7)	-0.2%
Other Education, Early Years and Young People	1,879	(64)	1,815	1,814	(1)	-0.1%
<b>TOTAL EDUCATION, EARLY YEARS AND YOUNG PEOPLE</b>	<b>189,087</b>	<b>(30,301)</b>	<b>158,786</b>	<b>158,281</b>	<b>(505)</b>	<b>-0.3%</b>
<b>SOCIAL SERVICES AND WELLBEING</b>						
Adult Social Care	105,753	(26,611)	79,142	78,028	(1,114)	-1.41%
Prevention and Wellbeing	7,323	(943)	6,380	6,188	(192)	-3.01%
Childrens Social Care	35,310	(1,247)	34,063	34,810	747	2.19%
<b>TOTAL SOCIAL SERVICES AND WELLBEING</b>	<b>148,386</b>	<b>(28,801)</b>	<b>119,585</b>	<b>119,026</b>	<b>(559)</b>	<b>-0.5%</b>
<b>COMMUNITIES DIRECTORATE</b>						
Planning & Development Services	2,544	(1,663)	881	881	-	0.0%
Strategic Regeneration	1,910	(969)	941	933	(8)	-0.9%
Economy, Natural Resources and Sustainability	7,847	(6,231)	1,616	1,612	(4)	-0.2%
Cleaner Streets and Waste Management	15,787	(2,430)	13,357	13,494	137	1.0%
Highways and Green Spaces	27,797	(14,106)	13,691	14,116	425	3.1%
Director and Head of Operations - Communities	300	(4)	296	284	(12)	-4.1%
Corporate Landlord	14,783	(11,136)	3,647	3,228	(419)	-11.5%
<b>TOTAL COMMUNITIES</b>	<b>70,968</b>	<b>(36,539)</b>	<b>34,429</b>	<b>34,548</b>	<b>119</b>	<b>0.3%</b>
<b>CHIEF EXECUTIVE'S</b>						
Chief Executive Unit	525	(2)	523	522	(1)	-0.2%
Finance	39,853	(35,417)	4,436	4,786	350	7.9%
HR/OD	2,346	(441)	1,905	1,876	(29)	-1.5%
Partnerships	3,893	(1,588)	2,305	2,394	89	3.9%
Legal, Democratic & Regulatory	7,343	(1,116)	6,227	6,166	(61)	-1.0%
Elections	190	(3)	187	235	48	25.7%
ICT	5,584	(1,261)	4,323	4,666	343	7.9%
Housing & Homelessness	12,682	(7,827)	4,855	4,515	(340)	-7.0%
Business Support	1,138	(137)	1,001	943	(58)	-5.8%
<b>TOTAL CHIEF EXECUTIVE'S</b>	<b>73,554</b>	<b>(47,792)</b>	<b>25,762</b>	<b>26,103</b>	<b>341</b>	<b>1.3%</b>
<b>TOTAL DIRECTORATE BUDGETS</b>	<b>481,995</b>	<b>(143,433)</b>	<b>338,562</b>	<b>337,958</b>	<b>(604)</b>	<b>-0.2%</b>
Council Wide Budgets	46,065	(1,401)	44,664	36,012	(8,652)	-19.4%
<b>NET BRIDGEND CBC</b>	<b>528,060</b>	<b>(144,834)</b>	<b>383,226</b>	<b>373,970</b>	<b>(9,256)</b>	<b>-2.4%</b>

NB: Differences due to rounding of £000's

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# Agenda Item 12

Meeting of:	CABINET
Date of Meeting:	3 FEBRUARY 2026
Report Title:	CAPITAL PROGRAMME QUARTER 3 UPDATE 2025-26
Report Owner / Responsible Chief Officer / Cabinet Member	CABINET MEMBER FOR FINANCE AND PERFORMANCE CHIEF OFFICER – FINANCE, HOUSING AND CHANGE
Responsible Officer:	HUW POWELL CAPITAL ACCOUNTANT
Policy Framework and Procedure Rules:	Paragraph 3.5.3 of the Financial Procedure Rules requires that the Chief Finance Officer shall report quarterly to Cabinet and Council with an update on the Capital Strategy and the Prudential Indicators. This report fulfils that requirement. There is no impact on the policy framework or procedure rules.
Executive Summary:	<ul style="list-style-type: none"><li>The report provides an update on the quarter 3 spend and projected spend for 2025-26 as at 31 December 2025, the revised capital programme for 2025-26 to 2034-35 and the projected Prudential and Other Indicators for 2025-26.</li><li>Appendix A shows the budgets, spend to date and projected year end spend as at 31 December 2025 for the individual schemes in 2025-26.</li><li>Appendix B shows the revised capital programme for 2025-26 to 2034-35.</li><li>Appendix C provides details of the actual Prudential and Other Indicators for 2024-25 and projected Prudential and Other Indicators for 2025-26.</li></ul>

## 1. Purpose of Report

### 1.1 The purpose of this report is to:

- Comply with the Chartered Institute of Public Finance and Accountancy's (CIPFA) 'The Prudential Code for Capital Finance in Local Authorities' requirement to report performance against all forward looking indicators on a quarterly basis.
- Provide an update to Cabinet on the capital programme position for 2025-26 as at 31 December 2025 (Appendix A).

- Seek agreement from Cabinet to present a report to Council for approval of a revised capital programme for 2025-26 to 2034-35 (**Appendix B**).
- Ask Cabinet to note the actual Prudential and Other Indicators for 2024-25 and the projected Prudential and Other Indicators for 2025-26 (**Appendix C**).

## 2. **Background**

2.1 The Local Authorities (Capital Finance and Accounting) (Wales) Regulations 2003 as amended, contain detailed provisions for the capital finance and accounting controls, including the rules on the use of capital receipts and what is to be treated as capital expenditure. They modify accounting practice in various ways to prevent adverse impacts on authorities' revenue resources.

2.2 As well as the legislation, the Council manages its Treasury Management and Capital activities in accordance with the following associated guidance: -

- CIPFA's Treasury Management in the Public Services: Code of Practice
- CIPFA's The Prudential Code for Capital Finance in Local Authorities
- Welsh Government (WG) revised Guidance on Local Authority Investments

2.3 The Prudential Code for Capital Finance in Local Authorities requires Local Authorities to have in place a Capital Strategy which demonstrates that the Authority takes capital expenditure and investment decisions in line with service objectives and properly takes account of stewardship, value for money, prudence, sustainability, and affordability. To demonstrate that the Council has fulfilled these objectives, the Prudential Code sets out a number of Indicators that must be set and monitored each year. The Council's Capital Strategy 2025-26, incorporating the Prudential Indicators for 2025-26, was approved by Council on 26 February 2025.

2.4 On 26 February 2025 Council approved a capital budget of £124.863 million for 2025-26 as part of a capital programme covering the period 2025-26 to 2034-35. The programme was last updated and approved by Council on 19 November 2025 with a revised budget of £78.247 million.

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

### 3.1 **Capital Programme Quarter 3 Update 2025-26**

3.1.1 This section of the report provides Members with an update on the Council's capital programme for 2025-26 since the budget was last approved by Council and incorporates any new schemes and grant approvals. The revised programme for 2025-26 currently totals £76.743 million, of which £39.337 million is met from Bridgend County Borough Council (BCBC) resources, including capital receipts, revenue contributions from earmarked reserves and borrowing, with the remaining £37.406 million coming from external resources, including Welsh Government General Capital Grant. Table 1 below shows the capital programme for each Directorate from the November 2025 approved Council position to Quarter 3:

**Table 1 – Capital Programme per Directorate 2025-26**

Directorate	Approved Council November 2025 £'000	New Approvals/ (Reductions) £'000	Virements £'000	Slippage to future years £'000	Revised Budget 2025-26 £'000
Education, Early Years and Young People (EEYYP)	23,542	726	-	-	24,268
Social Services and Wellbeing	1,036	-	1,120	-	2,156
Communities	45,716	1,162	-	(3,392)	43,486
Chief Executive's	5,964	-	-	-	5,964
Council Wide	1,989	-	(1,120)	-	869
<b>Total</b>	<b>78,247</b>	<b>1,888</b>	<b>-</b>	<b>(3,392)</b>	<b>76,743</b>

3.1.2 Table 2 below summarises the current funding assumptions for the capital programme for 2025-26. The capital resources are managed to ensure that maximum financial benefit for the Council is achieved. This may include the realignment of funding to maximise government grants.

**Table 2 – Capital Programme 2025-26 Resources**

CAPITAL RESOURCES	£'000
<b><i>BCBC Resources:</i></b>	
Capital Receipts	11,494
Earmarked Reserves	13,281
Unsupported Borrowing	7,035
Supported Borrowing	3,810
Other Loans	3,385
Revenue Contribution	332
<b>Total BCBC Resources</b>	<b>39,337</b>
<b><i>External Resources:</i></b>	
S106	2,152
Grants	35,254
<b>Total External Resources</b>	<b>37,406</b>
<b>TOTAL RESOURCES</b>	<b>76,743</b>

3.1.3 **Appendix A** provides details of the individual schemes within the capital programme, showing the budget available in 2025-26 compared to the projected year end spend at 31 December 2025. There are currently no projected under or over spends on any of the schemes at year end.

3.1.4 One scheme has been identified as requiring slippage of budget to future years (2026-27 and beyond).

**Porthcawl Grand Pavilion (£3.392 million)**

The contractor commenced work on site in August 2025 and an updated projected cashflow has been provided for the scheme through to completion, which is projected to be Autumn 2028. In line with the revised cashflow £3.392 million has been slipped for use in 2026-27.

3.1.5 There are a number of amendments to the capital programme for 2025-26, such as new and amended schemes, since the capital programme was last approved, including:

**School Capital Maintenance Grant (£0.726 million)**

Welsh Government has awarded the Council an additional £0.726 million from the Sustainable Communities for Learning Programme Repairs and Maintenance Grant. The funding will support capital maintenance work and will assist in reducing revenue costs by improving energy efficiency and performance of the school buildings.

**Children's Residential Home (£1.120 million)**

On 14 January 2026, Council approved £1.620 million to be included in the Council's Capital Programme for the acquisition and refurbishment of a children's residential home. The budget will initially be funded from BCBC resources, on the assumption that some or all the costs will be recovered via the Welsh Government Housing with Care Fund. £1.120 million will be added in 2025-26 to fund the acquisition costs, with the remaining £0.500 million added in 2026-27 to fund refurbishment works.

**Community Play Areas (£0.382 million)**

Following a review of s106 developer contributions, £0.382 million has been added to the Community Play Areas budget to fund the ongoing refurbishment works at play areas in the County Borough.

**Hillsboro South Public Realm (£0.600 million)**

The Council has been awarded £0.600 million from Welsh Government's Transforming Towns Grant to part fund public realm works in Hillsboro South, Porthcawl. The purpose of the funding is to create a high-quality events space to enhance Porthcawl as a destination, which will improve the connection between Porthcawl town centre and the Waterfront. The project will create open space with a range of characteristics from flexible, all-weather hard public realm to softer green space. The total budget for the scheme is £1.203 million, with BCBC's match funding of £0.603 million vired from the existing Porthcawl Regeneration budget.

**Low Carbon Heat (£0.200 million)**

Welsh Government's Energy Service has awarded the Council £0.180 million from the 2025-26 Low Carbon Heat Grant to install energy efficient heating and hot water systems at Abercerdin Primary's Sports Block and Civic Offices. The total cost of the

works is estimated to be £0.200 million, with the Council's contribution of £0.020 million vired from the existing 2030 Decarbonisation budget.

3.1.6 A revised Capital Programme is included as **Appendix B**.

### **3.2 Prudential and Other Indicators 2025-26 Monitoring**

3.2.1 The Capital Strategy is intended to give an overview of how capital expenditure; capital financing and treasury management activity contribute to the provision of services along with an overview of how associated risk is managed and the implications for future sustainability. To this end a number of prudential indicators were included in the Capital Strategy which was approved by Council in February 2025. In line with the requirements of the Prudential Code, the Chief Finance Officer is required to establish procedures to monitor both performance against all forward-looking prudential indicators and the requirement specified.

3.2.2 In February 2025, Council approved the Capital Strategy for 2025-26, which included the Prudential Indicators for 2025-26.

3.2.3 **Appendix C** details the actual indicators for 2024-25, the estimated indicators for 2025-26 set out in the Council's Capital Strategy and the projected indicators for 2025-26 based on the revised Capital Programme. These show that the Council is operating in line with the approved indicators.

### **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 five 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. 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 and Nature Implications**

6.1 These are reflected within the report where relevant to specific schemes.

### **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 These are reflected within the report.

## **9. Recommendations**

9.1 It is recommended that Cabinet:

- notes the Council's Capital Programme 2025-26 Quarter 3 update to 31 December 2025 (**Appendix A**)
- agrees that the revised Capital Programme (**Appendix B**) be submitted to Council for approval.
- notes the actual Prudential and Other Indicators for 2024-25 and projected indicators for 2025-26 (**Appendix C**).

## **Background documents**

None

## Bridgend County Borough Council

## CAPITAL MONITORING REPORT

QUARTER 3 TO 31 DECEMBER 2025

APPENDIX A

	Budget 25-26 (Council Nov 25)	New Approvals and Adjustments	Virement	Slipped (to)/ from Future Years	Revised Budget 2025-26	Total Expenditure to Date	Projected Spend	Over / (Under) Spend	Impact on BCBC Resources
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000

Education, Early Years and Young People

1 HIGHWAYS SCHEMES BAND B SCHOOL	100	-	-	-	100	28	100	-	-
2 HERONSBIDGE REPLACEMENT	1,733	-	-	-	1,733	514	1,733	-	-
3 MYNYDD CYNFFIG REPLACEMENT	227	-	-	-	227	74	227	-	-
4 Y G BRO OGWR REPLACEMENT	725	-	-	-	725	94	725	-	-
5 BRIDGEND WEST	2,976	-	-	-	2,976	336	2,976	-	-
6 YSGOL GYFYN GYMRAEG LLANGYNWYD	94	-	-	-	94	4	94	-	-
7 LAND PURCHASE BAND B SCHOOLS	2,026	-	-	-	2,026	15	2,026	-	-
8 GARW VALLEY SOUTH PRIMARY PROVISION	61	-	-	-	61	(4)	61	-	-
9 PENCOED PRIMARY SCHOOL BAND A	51	-	-	-	51	-	51	-	-
10 ABERCERDIN PRIMARY HUB	276	-	-	-	276	3	276	-	-
11 BRYNTLEG COMPREHENSIVE ALL WEATHER PITCH	26	-	-	-	26	5	26	-	-
12 EEYYP MINOR WORKS	567	-	-	-	567	476	567	-	-
13 SCHOOLS TRAFFIC SAFETY	50	-	-	-	50	2	50	-	-
14 SCHOOL MODERNISATION	333	-	-	-	333	-	333	-	-
15 PENCOED PRIMARY SCHOOL EXTENSION	-	-	-	-	-	(58)	-	-	-
16 COETY PRIMARY SCHOOL EXTENSION	2,476	-	-	-	2,476	87	2,476	-	-
17 BRYNTIRION COMPREHENSIVE NEW CLASSROOMS	695	-	-	-	695	680	695	-	-
18 BRYNTIRION COMP HIGHWAYS	66	-	-	-	66	(3)	66	-	-
19 SCHOOLS CAPITAL MAINTENANCE GRANT	4,180	726	-	-	4,906	1,796	4,906	-	-
20 WELSH MEDIUM GRANT - BRIDGEND	550	-	-	-	550	-	550	-	-
21 WELSH MEDIUM GRANT - PORTHCAWL	550	-	-	-	550	-	550	-	-
22 FREE SCHOOL MEALS	575	-	-	-	575	363	575	-	-
23 COMMUNITY FOCUSED SCHOOLS	1,663	-	-	-	1,663	331	1,663	-	-
24 ALN CAPITAL GRANT	1,580	-	-	-	1,580	250	1,580	-	-
25 YSGOL GYMRAEG BRO OGWR MOBILE CLASSROOMS	436	-	-	-	436	412	436	-	-
26 PORTHCAWL WELSH MEDIUM SEEDLING SCHOOL	181	-	-	-	181	205	181	-	-
27 FLYING START EXTENSION - NANTYMOEL PRIMARY	569	-	-	-	569	9	569	-	-
28 FLYING START HIGHWAYS	36	-	-	-	36	-	36	-	-
29 BRYNTIRION COMPREHENSIVE 3G PITCH	740	-	-	-	740	-	740	-	-
<b>TOTAL Education, Early Years and Young People</b>	<b>23,542</b>	<b>726</b>	<b>-</b>	<b>-</b>	<b>24,268</b>	<b>5,619</b>	<b>24,268</b>	<b>-</b>	<b>-</b>

Social Services and Wellbeing

30 BRYN Y CAE - UPGRADE HFE'S	40	-	-	-	40	-	40	-	-
31 TY CWM OGWR	23	-	-	-	23	-	23	-	-
32 WELLBEING MINOR WORKS	242	-	-	-	242	66	242	-	-
33 BAKERS WAY MINOR WORKS	10	-	-	-	10	-	10	-	-
34 CHILDRENS RESIDENTIAL HUB	18	-	-	-	18	4	18	-	-
35 CHILDRENS RESIDENTIAL HOME	-			1,120	-		1,120		

		Budget 25-26 (Council Nov 25)	New Approvals and Adjustments	Virement	Slipped (to)/ from Future Years	Revised Budget 2025-26	Total Expenditure to Date	Projected Spend	Over / (Under) Spend	Impact on BCBC Resources
		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
36	COMMUNITY CENTRES	117	-	-	-	117	(2)	117	-	-
37	BRYNGARW HOUSE	8	-	-	-	8	-	8	-	-
38	ALL WALES PLAY OPPORTUNITIES	231	-	-	-	231	205	231	-	-
39	BRIDGEND LIFE CENTRE	272	-	-	-	272	-	272	-	-
40	BRACKLA SPORTS CENTRE	75	-	-	-	75	-	75	-	-
<b>TOTAL Social Services &amp; Wellbeing</b>		<b>1,036</b>	<b>-</b>	<b>1,120</b>	<b>-</b>	<b>2,156</b>	<b>273</b>	<b>2,156</b>	<b>-</b>	<b>-</b>

**Communities****Street Scene**

41	COMMUNITY PLAY AREAS	2,361	382	-	-	2,743	940	2,743	-	-
42	PARKS/PAVILIONS/OTHER COMMUNITY ASSET TRANSFERS	1,054	-	-	-	1,054	249	1,054	-	-
43	ABERFIELDS PLAYFIELDS	11	-	-	-	11	-	11	-	-
44	CITY DEAL	175	-	-	-	175	-	175	-	-
45	COYCHURCH CREM WORKS	22	-	-	-	22	-	22	-	-
46	REMEDIAL MEASURES - CAR PARKS	135	-	-	-	135	11	135	-	-
47	CIVIL PARKING ENFORCEMENT CAR	54	-	-	-	54	-	54	-	-
48	20 MPH DEFAULT SPEED	209	-	-	-	209	75	209	-	-
49	ROAD SAFETY SCHEMES	3	-	-	-	3	(2)	3	-	-
50	HIGHWAYS STRUCTURAL WORKS	394	-	-	-	394	234	394	-	-
51	CARRIAGEWAY CAPITAL WORKS	302	-	-	-	302	150	302	-	-
52	PROW CAPITAL IMPROVEMENT STRUCTURES	50	-	-	-	50	20	50	-	-
53	HIGHWAYS REFURBISHMENT	1,014	-	-	-	1,014	1,129	1,014	-	-
54	REPLACEMENT OF STREET LIGHTING	519	-	-	-	519	91	519	-	-
55	RIVER BRIDGE PROTECTION MEASURES	22	-	-	-	22	-	22	-	-
56	COMMUNITIES MINOR WORKS	582	-	-	-	582	110	582	-	-
57	ULEV TRANSFORMATION FUND 2	111	-	-	-	111	-	111	-	-
58	FLEET TRANSITION-ULEV	54	-	-	-	54	(11)	54	-	-
59	NET ZERO CARBON FLEET	147	-	-	-	147	-	147	-	-
60	PORTHCAWL METRO LINK (CCR)	19	-	-	-	19	(50)	19	-	-
61	RESIDENTS PARKING BRIDGEND TOWN CENTRE	109	-	-	-	109	3	109	-	-
62	FLEET VEHICLES	1,971	-	-	-	1,971	751	1,971	-	-
63	CEMETERIES	314	-	-	-	314	2	314	-	-
64	S106 HIGHWAYS SMALL SCHEMES	35	-	-	-	35	4	35	-	-
65	ROAD SAFETY IMPROVEMENTS	67	-	-	-	67	(9)	67	-	-
66	COAL TIP SAFETY	1,795	-	-	-	1,795	113	1,795	-	-
67	GRASS CUTTING EQUIPMENT	101	-	-	-	101	30	101	-	-
68	WASTE VEHICLES	-	-	-	-	-	-	-	-	-
69	HIGHWAYS MAINTENANCE LGBI	2,908	-	-	-	2,908	2,716	2,908	-	-
70	RESILIENT ROADS	494	-	-	-	494	-	494	-	-
71	BRIDGEND BUS STATION	186	-	-	-	186	56	186	-	-
<b>TOTAL Streetscene</b>		<b>15,218</b>	<b>382</b>	<b>-</b>	<b>-</b>	<b>15,600</b>	<b>6,612</b>	<b>15,600</b>	<b>-</b>	<b>-</b>

	Budget 25-26 (Council Nov 25)	New Approvals and Adjustments	Virement	Slipped (to)/ from Future Years	Revised Budget 2025-26	Total Expenditure to Date	Projected Spend	Over / (Under) Spend	Impact on BCBC Resources
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b><i>Regeneration &amp; Development</i></b>									
72 EU CONVERGANCE SRF BUDGET	436	-	-	-	436	18	436	-	-
73 PORTHCAWL REGENERATION PROJECT	2,827	-	(603)	-	2,224	254	2,224	-	-
74 ECONOMIC STIMULUS GRANT	315	-	-	-	315	72	315	-	-
75 COASTAL RISK MANAGEMENT PROGRAM	184	-	-	-	184	19	184	-	-
76 EWENNY ROAD INDUSTRIAL ESTATE	3,485	-	-	-	3,485	3,451	3,485	-	-
77 CESP/ARBED PHASE 1	2,123	-	-	-	2,123	70	2,123	-	-
78 BRIDGEND HEAT SCHEME	3,265	-	-	-	3,265	-	3,265	-	-
79 MAESTEG TOWN HALL CULTURAL HUB	61	-	-	-	61	(117)	61	-	-
80 TOWN & COMMUNITY COUNCIL FUND	183	-	-	-	183	14	183	-	-
81 PORTHCAWL TOWNSCAPE HERITAGE INITIATIVE	89	-	-	-	89	-	89	-	-
82 COMMERCIAL PROPERTY ENHANCEMENT FUND	134	-	-	-	134	-	134	-	-
83 URBAN CENTRE PROPERTY ENHANCE	650	-	-	-	650	252	650	-	-
84 2030 DECARBONISATION	604	-	(20)	-	584	243	584	-	-
85 SHARED PROSPERITY FRAMEWORK	3,077	-	-	-	3,077	2,009	3,077	-	-
86 LOCAL PLACES FOR NATURE	367	-	-	-	367	12	367	-	-
87 PORTHCAWL GRAND PAVILION	7,892	-	-	(3,392)	4,500	2,139	4,500	-	-
88 PRIDE IN PLACE IMPACT FUND	1,500	-	-	-	1,500	-	1,500	-	-
89 HILLSBORO SOUTH PUBLIC REALM	-	600	603	-	1,203	-	1,203	-	-
90 LOW CARBON HEAT	-	180	20	-	200	-	200	-	-
<b>TOTAL Regeneration &amp; Development</b>	<b>27,192</b>	<b>780</b>	<b>-</b>	<b>-</b>	<b>3,392</b>	<b>24,580</b>	<b>8,436</b>	<b>24,580</b>	<b>-</b>
<b><i>Corporate Landlord</i></b>									
91 DDA WORKS	198	-	-	-	198	6	198	-	-
92 MINOR WORKS	2,192	-	-	-	2,192	79	2,192	-	-
93 FIRE PRECAUTIONS MINOR WORKS	107	-	-	-	107	65	107	-	-
94 BRYNCETHIN DEPOT FACILITIES	272	-	-	-	272	3	272	-	-
95 WATERTON UPGRADE	490	-	-	-	490	10	490	-	-
96 INVESTING IN COMMUNITIES	47	-	-	-	47	-	47	-	-
<b>TOTAL Corporate Landlord</b>	<b>3,306</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3,306</b>	<b>163</b>	<b>3,306</b>	<b>-</b>	<b>-</b>
<b>TOTAL Communities</b>	<b>45,716</b>	<b>1,162</b>	<b>-</b>	<b>(3,392)</b>	<b>43,486</b>	<b>15,211</b>	<b>43,486</b>	<b>-</b>	<b>-</b>
<b><i>Chief Executive</i></b>									
97 MANDATORY DFG RELATED EXPEND	1,750	-	-	-	1,750	1,577	1,750	-	-
98 DISCRETIONARY HOUSING GRANTS	200	-	-	-	200	24	200	-	-
99 HOUSING RENEWAL AREA	100	-	-	-	100	53	100	-	-
100 ENABLE GRANT	382	-	-	-	382	195	382	-	-
101 HOMELESSNESS AND HOUSING	530	-	-	-	530	-	530	-	-
102 HEALTH & WELLBEING VILLAGE	480	-	-	-	480	-	480	-	-
103 AFFORDABLE HOUSING	802	-	-	-	802	353	802	-	-
104 ENFORCEMENT FUND 1	250	-	-	-	250	3	250	-	-

		Budget 25-26 (Council Nov 25)	New Approvals and Adjustments	Virement	Slipped (to)/ from Future Years	Revised Budget 2025-26	Total Expenditure to Date	Projected Spend	Over / (Under) Spend	Impact on BCBC Resources
		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
105	ENFORCEMENT FUND 2	22	-	-	-	22	-	22	-	-
106	ENFORCEMENT FUND 3	75	-	-	-	75	1	75	-	-
107	MULTI PROJECT ENFORCEMENT FUND	100	-	-	-	100	-	100	-	-
<b>TOTAL Housing/Homelessness</b>		<b>4,691</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>4,691</b>	<b>2,206</b>	<b>4,691</b>	<b>-</b>	<b>-</b>
108	ICT INFRA SUPPORT	452	-	-	-	452	76	452	-	-
109	DIGITAL TRANSFORMATION	597	-	-	-	597	-	597	-	-
110	CCTV SYSTEMS REPLACEMENT	-	-	-	-	-	-	-	-	-
111	ICT DATA CENTRE REPLACEMENT	39	-	-	-	39	-	39	-	-
112	HWB SCHOOLS IT	185	-	-	-	185	118	185	-	-
<b>TOTAL ICT</b>		<b>1,273</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,273</b>	<b>194</b>	<b>1,273</b>	<b>-</b>	<b>-</b>
<b>TOTAL Chief Executive</b>		<b>5,964</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>5,964</b>	<b>2,400</b>	<b>5,964</b>	<b>-</b>	<b>-</b>
<b>Council Wide Capital Budgets</b>										
113	CORPORATE CAPITAL FUND	773	-	-	-	773	-	773	-	-
114	UNALLOCATED	1,216	-	(1,120)	-	96	-	96	-	-
		1,989	-	(1,120)	-	869	-	869	-	-
<b>GRAND TOTAL</b>		<b>78,247</b>	<b>1,888</b>	<b>-</b>	<b>(3,392)</b>	<b>76,743</b>	<b>23,503</b>	<b>76,743</b>	<b>-</b>	<b>-</b>

		Date Approved	Total 2025-2035			2025-26					Future Years									CUMULATIVE									
			Total Cost £'000	BCBC Funding £'000	External Funding £'000	Council Nov 25 2025-26 £'000	New Approvals / Reductions £'000	Virement £'000	Slipped (to)/from Future Years £'000	Revised 2025-26 £'000	2026-2027		2027-2028		2028-2029		2029-2030		2030-2031		2031-2032		2032-2033		2033-2034		2034-2035		
											£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	Total 2024 - 2035		
<b>Education, Early Years and Young People</b>																													
1	Highways / Other Offsite Works Band B Schools	20/21	3,392	3,392	-	100					100	3,292														3,392			
2	Heronsbridge Replacement	22/23	40,459	13,705	26,754	1,733					1,733	19,000	19,726													40,459			
3	Mynydd Cynffig Replacement	22/23	13,680	5,575	8,105	227					227	7,828	5,625													13,680			
4	Y G Bro Ogwr Replacement	22/23	15,497	3,406	12,091	725					725	6,291	8,481													15,497			
5	Bridgend West	22/23	42,647	12,598	30,049	2,976					2,976	37,285	2,386													42,647			
6	Ysgol Gyfun Gymraeg Llangynwyd	21/22	94	94	-	94					94															94			
7	Land Purchase Band B	21/22	2,026	2,026	-	2,026					2,026															2,026			
8	Garw Valley South Primary Provision	14/15	61	61	-	61					61															61			
9	Pencoed Primary School - Band A	14/15	51	51	-	51					51															51			
10	Abercerdin Primary School Hub	21/22	276	276	-	276					276															276			
11	Brynteg Comprehensive School All Weather Pitch	21/22	26	26	-	26					26															26			
12	Schools Minor Works	RECURRENT	567	556	11	567					567															567			
13	Schools Traffic Safety	16/17	50	50	-	50					50															50			
14	School Modernisation	14/15	333	333	-	333					333															333			
15	Pencoed Primary School - Classroom Extension	22/23	-	-	-	-					-															-			
16	Coety Primary School - Extension	22/23	2,476	2,148	328	2,476					2,476															2,476			
17	Bryntirion Comprehensive New Classrooms	22/23	695	171	524	695					695															695			
18	Bryntirion Comprehensive School Highways	23/24	66	66	-	66					66															66			
19	School's Capital Maintenance Grant	19/20	4,906	3,059	1,847	4,180	726				4,906															4,906			
20	Welsh Medium Childcare Provision - Bridgend	19/20	550	-	550	550					550															550			
21	Welsh Medium Childcare Provision - Porthcawl	19/20	550	-	550	550					550															550			
22	Free School Meals	22/23	575	228	347	575					575															575			
23	Community Focused Schools	22/23	1,663	953	710	1,663					1,663															1,663			
24	ALN Capital Grant	22/23	1,580	672	908	1,580					1,580															1,580			
25	Y G Bro Ogwr Mobile Classrooms	22/23	436	-	436	436					436															436			
26	Porthcawl Welsh Medium Seedling School	22/23	181	181		181					181															181			
27	Flying Start Extension - Nantymoel Primary	23/24	569	-	569	569					569															569			
28	Flying Start Highways	24/25	36	22	14	36					36															36			
29	Bryntirion Comprehensive 3G Pitch	25/26	740	-	740	740					740															740			
<b>Total Education, Early Years and Young People</b>			<b>134,182</b>	<b>49,649</b>	<b>84,533</b>	<b>23,542</b>	<b>726</b>	-	-	-	<b>24,268</b>	<b>73,696</b>	<b>36,218</b>	-	-	-	-	-	-	-	-	-	-	-	<b>134,182</b>				
<b>Social Services and Well-being</b>																													
<b>Adult Social Care</b>																													
30	Bryn Y Cae	19/20	40	40		40					40															40			
31	Ty Cwm Ogwr Care Home	21/22	23	23		23					23															23			
32	Wellbeing Minor Works	RECURRENT	242	242		242					242															242			
33	Bakers Way	17/18	10	10	-	10					10															10			
34	Children's Residential Accommodation Hub	18/19	18	18	-	18					18															18			
35	Children's Residential Home	25/26	1,620	1,620							1,120															1,620			
<b>Culture</b>																													
36	Community Centres	20/21	117	117		117					117															117			
37	Bryngarw House	20/21	8	8		8					8															8			
38	All Wales Play Opportunities	25/26	231		231	231					231</																		





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## APPENDIX C

### PRUDENTIAL AND OTHER INDICATORS 2024-25 and 2025-26

The Prudential Indicators are required to be set and approved by Council in accordance with CIPFA's Prudential Code for Capital Finance in Local Authorities.

Table 1 shows the 2024-25 actual capital expenditure, the capital programme approved by Council on 26 February 2025 and the projected capital expenditure for the current financial year which has incorporated slippage of schemes from 2024-25 together with any new grants and contributions or changes in the profile of funding for 2025-26.

*Table 1: Prudential Indicator: Estimates of Capital Expenditure*

	2024-25 Actual £m	2025-26 Estimate (Council Feb 25) £m	2025-26 Projection £m
Council Fund services	29.331	124.863	76.743
Right of Use Assets	3.925	-	0.351
<b>TOTAL</b>	<b>33.256</b>	<b>124.863</b>	<b>77.094</b>

All capital expenditure must be financed, either from external sources (government grants and other contributions), the Council's own resources (revenue, reserves and capital receipts) or debt (the 'net financing requirement' - borrowing, leasing and Private Finance Initiative). The planned financing of the expenditure has been projected as follows:

*Table 2: Capital financing*

	2024-25 Actual £m	2025-26 Estimate (Council Feb 25) £m	2025-26 Projection £m
External sources	20.706	72.610	37.406
Own resources	2.858	34.907	25.107
Net Financing Requirement	9.692	17.346	14.581
<b>TOTAL</b>	<b>33.256</b>	<b>124.863</b>	<b>77.094</b>

The net financing requirement is only a temporary source of finance, since loans and leases must be repaid, and this is therefore replaced over time by other financing, usually from revenue which is known as the Minimum Revenue Provision (MRP). As well as MRP, the Council makes additional voluntary revenue contributions to pay off Prudential or Unsupported Borrowing. The total of these are shown in Table 3 below:

Table 3: Replacement of debt finance

	2024-25 Actual £m	2025-26 Estimate (Council Feb 25) £m	2025-26 Projection £m
Minimum Revenue Provision (MRP)	1.200	1.149	1.198
Additional Voluntary Revenue Provision (VRP)	1.870	2.243	2.429
<b>Total MRP &amp; VRP</b>	<b>3.070</b>	<b>3.392</b>	<b>3.627</b>
<b>Other MRP on Long term Liabilities</b>	<b>1.239</b>	<b>1.232</b>	<b>1.359</b>
<b>Total Own Resources</b>	<b>4.309</b>	<b>4.624</b>	<b>4.986</b>

The Council's cumulative outstanding amount of debt finance is measured by the Capital Financing Requirement (CFR). This increases with new debt-financed capital expenditure and reduces by the MRP amount within the year. Based on the above figures for expenditure and financing, the Council's actual CFR is as follows based on the movement on capital expenditure during the year:

Table 4: Prudential Indicator: Estimates of Capital Financing Requirement

	2024-25 Actual £m	2025-26 Estimate – Capital Strategy £m	2025-26 Projection £m
<b>Capital Financing Requirement</b>			
Opening CFR excluding PFI & other liabilities	162.745	166.329	165.442
Opening PFI & other leases CFR	12.974	14.975	15.670
<b>Total opening CFR</b>	<b>175.719</b>	<b>181.304</b>	<b>181.112</b>
Movement in CFR excluding PFI & other liabilities	(0.981)	13.954	10.954
Movement in PFI and other long term leases CFR	6.356	(1.232)	(1.359)
<b>Total movement in CFR</b>	<b>5.375</b>	<b>12.722</b>	<b>9.595</b>
<b>Closing CFR</b>	<b>181.094</b>	<b>194.026</b>	<b>190.707</b>
<b>Movement in CFR represented by:</b>			
Net financing need for year (Table 2 above)	9.604	17.346	14.581
Minimum and voluntary revenue provisions	(3.070)	(3.392)	(3.627)
MRP on PFI and other long term leases (Table 3)	(1.159)	(1.232)	(1.359)
<b>Total movement</b>	<b>5.375</b>	<b>12.722</b>	<b>9.595</b>

The capital borrowing need (Capital Financing Requirement) has not been fully funded with loan debt as cash supporting the Council's reserves, balances and cash flow has been used as a temporary measure. This is known as Internal Borrowing. Projected levels of the Council's total outstanding debt, which comprises of borrowing, PFI and Other Long Term Liabilities, are shown below compared with the Capital Financing Requirement:

*Table 5: Prudential Indicator: Gross Debt and the Capital Financing Requirement*

	2024-25 Actual £m	2025-26 Estimate (Council Feb 25) £m	2025-26 Projection £m
Debt (incl. PFI & leases)	<b>119.412</b>	<b>103.428</b>	<b>112.152</b>
Capital Financing Requirement	<b>181.094</b>	<b>194.026</b>	<b>190.707</b>

Statutory guidance is that debt should remain below the capital financing requirement, except in the short-term. As can be seen, the Council expects to comply with this in the medium term.

The Council is legally obliged to set an affordable borrowing limit (also termed the authorised limit for external debt) each year. In line with statutory guidance, a lower "operational boundary" is also set as a warning level should debt approach the limit.

*Table 6: Prudential Indicators: Authorised limit and operational boundary for external debt in £m*

	2024-25 Actual £m	2025-26 Estimate (Council Feb 25) £m	2025-26 Projection £m
Authorised limit – borrowing	170.000	170.000	170.000
Authorised limit – other long term liabilities	25.000	25.000	25.000
<b>Authorised Limit Total</b>	<b>195.000</b>	<b>195.000</b>	<b>195.000</b>
Operational boundary – borrowing	120.000	140.000	140.000
Operational boundary – other long term liabilities	20.000	20.000	20.000
<b>Operational Boundary Limit Total</b>	<b>140.000</b>	<b>160.000</b>	<b>160.000</b>
<b>Total Borrowing and Long Term Liabilities</b>	<b>119.460</b>	<b>103.428</b>	<b>112.152</b>

Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP are charged to revenue, offset by any investment income receivable. The net annual charge is known as financing costs; this is compared to the net revenue stream i.e. the amount funded from Council Tax, business rates and general government grants

*Table 7: Prudential Indicator: Proportion of financing costs to net revenue stream*

	2024-25 Actual £m	2025-26 Estimate (Council Feb 25) £m	2025-26 Projection £m
Capital Financing Central	5.142	5.065	6.456
Other Financing costs	0.945	0.869	1.078
<b>TOTAL FINANCING COSTS</b>	<b>6.087</b>	<b>5.934</b>	<b>7.534</b>
Proportion of net revenue stream	1.94%	1.55%	1.99%

This shows that in 2025-26, it is forecast that 1.99% of the Council's net revenue income will be spent on paying back the costs of capital expenditure.

The net revenue stream is calculated as the income from Welsh Government Revenue Support Grant plus Council Tax and Non-Domestic Rates, less Police and Community Council precepts.

The table below shows the Prudential Indicator of estimates of net income from commercial and service investments to net revenue stream.

*Table 8: Prudential Indicator: Net Income from Commercial and Service Investments to Net Revenue Stream*

	2024-25 Actual £m	2025-26 Estimate £m	2025-26 Projection £m
Net Revenue Budget	361.283	383.226	383.226
Income from Commercial Investments	0.459	0.459	0.459
% Ratio	0.13%	0.12%	0.12%

The income receivable from the commercial property portfolio is not deemed to be a financial resilience risk in terms of being 'disproportionate' to the Council's overall income.

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>3 FEBRUARY 2026</b>
<b>Report Title:</b>	<b>CABINET, COUNCIL AND OVERVIEW AND SCRUTINY COMMITTEE FORWARD WORK PROGRAMMES</b>
<b>Report Owner / Responsible Chief Officer/Cabinet Member:</b>	<b>CHIEF OFFICER – LEGAL AND REGULATORY SERVICES, HR AND CORPORATE POLICY</b> <b>CABINET MEMBER FOR FINANCE AND PERFORMANCE</b>
<b>Responsible Officer:</b>	<b>MARK GALVIN – SENIOR DEMOCRATIC SERVICES OFFICER - COMMITTEES</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no impact on the policy framework and procedure rules.</b>
<b>Executive Summary:</b>	<b>The report is required in order to outline the planned programme of items proposed to be considered at Cabinet, Council and Overview and Scrutiny Committee meetings in the coming six months. The publishing of this report will benefit the public in terms of them being made aware of such key items of business in advance of future meetings.</b>

## 1. Purpose of Report

1.1 The purpose of this report is to seek Cabinet approval for items to be included on the Cabinet Forward Work Programme for the period 1 March 2026 to 31 August 2026 and for Cabinet to note the Council and Overview and Scrutiny Committees' Forward Work Programmes for the same period.

## 2. Background

2.1 The Forward Work Programme is usually prepared by the Monitoring Officer to cover a period of four months except when ordinary elections of councillors occur. However, following a recent recommendation from Audit Wales, it has now been amended to cover six months. This is to give more opportunity for robust pre-decision scrutiny and provide greater transparency around the decision-making process for both Members and the public.

2.2 The Forward Work Programme will contain matters which the Cabinet, Overview and Scrutiny Committees and full Council are likely or scheduled to consider. It will contain information on:

(a) the timetable for considering the Budget and any plans, policies or strategies forming part of the Policy Framework and requiring Council approval, and which body is to

consider them;

(b) the timetable for considering any plans, policies or strategies which are the responsibility of the Cabinet;

(c) the work programme of the Overview and Scrutiny Committees, to the extent that it is known.

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

3.1 The proposed Forward Work Programmes for the above period are appended to the report, as follows:

- Cabinet - **Appendix 1**
- Council - **Appendix 2**
- Overview and Scrutiny Committees - **Appendix 3**

3.2 Following consideration by Cabinet, the Forward Work Programmes will be published on the Council's website bi-lingually.

### **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.

### **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 or corporate parent implications arising from this report.

### **8. Financial Implications**

8.1 There are no financial implications arising from this report.

### **9. Recommendations**

- Approve the Cabinet Forward Work Programme for the period 1 March 2026 to 31 August 2026 at **Appendix 1**;
- Note the Council and Overview and Scrutiny Committees' Forward Work Programmes for the same period, as shown at **Appendix 2** and **Appendix 3** of the report, respectively.

## **Background documents**

None.

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**CABINET FORWARD WORK PROGRAMME - 1 MARCH 2026 TO 31 AUGUST 2026**

Date	Title of Report	Contact Officer
10 Mar 26	Connect to Work	<b>Janine Nightingale</b> Corporate Director Communities Tel: 01656 643241 Email: <a href="mailto:Janine.nightingale@bridgend.gov.uk">Janine.nightingale@bridgend.gov.uk</a>
10 Mar 26	Porthcawl Harbour	<b>Janine Nightingale</b> Corporate Director Communities Tel: 01656 643241 Email: <a href="mailto:Janine.nightingale@bridgend.gov.uk">Janine.nightingale@bridgend.gov.uk</a>
10 Mar 26	Care at Home Commissioning	<b>Claire Merchant</b> Corporate Director Social Services & Wellbeing Tel: 01656 643248 Email: <a href="mailto:Claire.merchant@bridgend.gov.uk">Claire.merchant@bridgend.gov.uk</a>
10 Mar 26	Social Housing Allocation Policy	<b>Carys Lord</b> Chief Officer – Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>

Date	Title of Report	Contact Officer
10 Mar 26	<b>Homelessness Temporary Accommodation</b>	<b>Carys Lord</b> Chief Officer – Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>
14 Apr 26	<b>Allocations under the Town &amp; Community Council Capital Grant Scheme 2026-27</b>	<b>Janine Nightingale</b> Corporate Director Communities Tel: 01656 643241 Email: <a href="mailto:Janine.nightingale@bridgend.gov.uk">Janine.nightingale@bridgend.gov.uk</a>
14 Apr 26	<b>Transformation Strategy</b>	<b>Jake Morgan</b> Chief Executive Tel: 01656 643380 Email: <a href="mailto:Jake.Morgan@bridgend.gov.uk">Jake.Morgan@bridgend.gov.uk</a>
12 May 26	<b>Proposed Dates for Meetings of Cabinet and Cabinet Committees</b>	<b>Kelly Watson</b> Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: <a href="mailto:Kelly.watson@bridgend.gov.uk">Kelly.watson@bridgend.gov.uk</a>
23 Jun 26	<b>Corporate Plan Delivery Plan</b>	<b>Jake Morgan</b> Chief Executive Tel: 01656 643380 Email: <a href="mailto:Jake.Morgan@bridgend.gov.uk">Jake.Morgan@bridgend.gov.uk</a>

Date	Title of Report	Contact Officer
23 Jun 26	<b>Revenue Budget Outturn 2025-26</b>	<p><b>Carys Lord</b>            Chief Officer – Finance, Housing and Change            Tel: 01656 643302            Email:  <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a></p>
23 Jun 26	<b>Representation on Outside Bodies, Joint Committees and Cabinet Committees</b>	<p><b>Kelly Watson</b>            Chief Officer, Legal and Regulatory Services, HR and Corporate Policy            Tel: 01656 643248            Email: <a href="mailto:Kelly.watson@bridgend.gov.uk">Kelly.watson@bridgend.gov.uk</a></p>
21 Jul 26	<b>Capital Programme Outturn 2025-26 and Quarter 1 Update 2026-27</b>	<p><b>Carys Lord</b>            Chief Officer – Finance, Housing and Change            Tel: 01656 643302            Email:  <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a></p>
21 Jul 26	<b>Budget Monitoring 2026-27 – Quarter 1 Revenue Forecast</b>	<p><b>Claire Marchant</b>            Corporate Director Social Services &amp; Wellbeing            Tel: 01656 643248            Email: <a href="mailto:Claire.merchant@bridgend.gov.uk">Claire.merchant@bridgend.gov.uk</a></p>

Date	Title of Report	Contact Officer
21 Jul 26	Treasury Management Outturn Report 2025-26	<b>Carys Lord</b> Chief Officer – Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>

## APPENDIX 2

COUNCIL FORWARD WORK PROGRAMME – 1 MARCH 2026 TO 31 AUGUST 2026

Date	Title of Report	Contact Officer
11 Mar 26	Pay Policy 2026-27	<b>Kelly Watson</b> Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: <a href="mailto:Kelly.Watson@bridgend.gov.uk">Kelly.Watson@bridgend.gov.uk</a>
11 Mar 26	DBCC Annual Remuneration Report 2026-27	<b>Kelly Watson</b> Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: <a href="mailto:Kelly.Watson@bridgend.gov.uk">Kelly.Watson@bridgend.gov.uk</a>
11 Mar 26	Related Party Transactions 2025-26 for Statement of Accounts	<b>Carys Lord</b> Chief Officer - Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>
15 Apr 26	Transformation Strategy	<b>Jake Morgan</b> Chief Executive Tel: 01656 643380 Email: <a href="mailto:Jake.Morgan@bridgend.gov.uk">Jake.Morgan@bridgend.gov.uk</a>

Date	Title of Report	Contact Officer
13 May 26	<b>Appointment to Council Committees and other Council Bodies</b>	<b>Kelly Watson</b> Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: <a href="mailto:Kelly.Watson@bridgend.gov.uk">Kelly.Watson@bridgend.gov.uk</a>
13 May 26	<b>Proposed Programme of Meetings of the Council and other Committees</b>	<b>Kelly Watson</b> Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: <a href="mailto:Kelly.Watson@bridgend.gov.uk">Kelly.Watson@bridgend.gov.uk</a>
13 May 26	<b>Representation on Outside Bodies and other Committees</b>	<b>Kelly Watson</b> Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: <a href="mailto:Kelly.Watson@bridgend.gov.uk">Kelly.Watson@bridgend.gov.uk</a>
24 Jun 26	<b>Corporate Plan Delivery Plan</b>	<b>Jake Morgan</b> Chief Executive Tel: 01656 643380 Email: <a href="mailto:Jake.Morgan@bridgend.gov.uk">Jake.Morgan@bridgend.gov.uk</a>
24 Jun 26	<b>Revenue Budget Outturn 2025-26</b>	<b>Carys Lord</b> Chief Officer - Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>

Date	Title of Report	Contact Officer
22 Jul 26	<b>Capital Programme Outturn 2025-26 and Quarter 1 Update 2026-27</b>	<b>Carys Lord</b> Chief Officer - Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>
22 Jul 26	<b>Treasury Management Outturn Report 2025-26</b>	<b>Carys Lord</b> Chief Officer - Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>

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OVERVIEW AND SCRUTINY FORWARD WORK PROGRAMME – 1 MARCH 2026 – 31 AUGUST 2026

Date	Title of Report	Scrutiny Committee	Contact Officer
12 Mar 26	<ul style="list-style-type: none"> <li>- Assisted Transport Policy Implementation Progress</li> <li>- Learning Disability Transformation Programme Progress</li> </ul>	Social Services, Health and Wellbeing Overview and Scrutiny Committee	<p>Claire Marchant Corporate Director Social Services &amp; Wellbeing Tel: 01656 643248 Email: <a href="mailto:Claire.marchant@bridgend.gov.uk">Claire.marchant@bridgend.gov.uk</a></p>
16 Mar 26	<ul style="list-style-type: none"> <li>- Early Review of School Improvement Arrangements into the Local Authority</li> </ul>	Education and Youth Services Overview and Scrutiny Committee	<p>Lindsay Harvey Corporate Director – Education, Early Years and Young People Tel: 01656 642612 Email: <a href="mailto:Lindsay.harvey@bridgend.gov.uk">Lindsay.harvey@bridgend.gov.uk</a></p>
26 Mar 26	<ul style="list-style-type: none"> <li>- Quarter 3 Performance Report 2025-26</li> <li>- Budget Monitoring 2025-26 – Quarter 3 Revenue Forecast</li> </ul>	Corporate Overview and Scrutiny Committee	<p>Carys Lord Chief Officer - Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a></p>

Date	Title and Description of Report	Scrutiny Committee	Contact Officer
Page 262			
	<ul style="list-style-type: none"> <li>- Corporate Plan Delivery Plan Review 2025-26</li> </ul>		<p><b>Jake Morgan</b>  <b>Chief Executive</b>  <b>Tel: 01656 643136</b>  <b>Email:</b>  <a href="mailto:Jake.Morgan@bridgend.gov.uk">Jake.Morgan@bridgend.gov.uk</a></p>
20 Apr 26	<ul style="list-style-type: none"> <li>- Bridgend Town Centre Masterplan and Regeneration</li> <li>- Condition of the Highways and Status of Road Resurfacing Programme</li> </ul>	Communities, Environment and Housing Overview and Scrutiny Committee	<p><b>Janine Nightingale</b>  <b>Corporate Director, Communities</b>  <b>Tel: 01656 643179</b>  <b>Email:</b>  <a href="mailto:Janine.Nightingale@bridgend.gov.uk">Janine.Nightingale@bridgend.gov.uk</a></p>
27 Apr 26	- Western Bay Adoption Service Inspection Report	Social Services, Health and Wellbeing Overview and Scrutiny Committee	<p><b>Claire Marchant</b>  <b>Corporate Director Social Services &amp; Wellbeing</b>  <b>Tel: 01656 643248</b>  <b>Email:</b>  <a href="mailto:Claire.merchant@bridgend.gov.uk">Claire.merchant@bridgend.gov.uk</a></p>
29 Jun 26 (Subject to agreement)	<ul style="list-style-type: none"> <li>- Election of Chairperson</li> <li>- Corporate Parenting Champion Nomination</li> </ul>	Corporate Overview and	<p><b>Kelly Watson</b>  <b>Chief Officer, Legal and Regulatory Services, HR and</b></p>

Date	Title and Description of Report	Scrutiny Committee	Contact Officer
Page 263 at Annual Council)	<ul style="list-style-type: none"> <li>- Nominations to the Joint Overview and Scrutiny Arrangements following Transition to a Single Public Services Board (PSB) for Cwm Taf Morgannwg</li> <li>- Draft Forward Work Programme (including Q3 Performance Dashboards &amp; Regulatory tracker)</li> <li>- Revenue Budget Outturn 2025-2026</li> </ul>	Scrutiny Committee	<p><b>Corporate Policy</b> Tel: 01656 643248 Email: <a href="mailto:Kelly.Watson@bridgend.gov.uk">Kelly.Watson@bridgend.gov.uk</a></p> <p><b>Carys Lord</b> Chief Officer - Finance, Housing and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a></p>
2 Jul 26 (Subject to agreement at Annual Council)	- TBC	Education and Youth Services Overview and Scrutiny Committee	<p><b>Lindsay Harvey</b> Corporate Director – Education, Early Years and Young People Tel: 01656 642612 Email: <a href="mailto:Lindsay.harvey@bridgend.gov.uk">Lindsay.harvey@bridgend.gov.uk</a></p>
9 Jul 26 (Subject to agreement at Annual	- Provision of Accommodation Based Regulated Support Services in Bridgend	Social Services, Health and Wellbeing	<p><b>Claire Marchant</b> Corporate Director Social Services &amp; Wellbeing Tel: 01656 643248</p>

Date	Title and Description of Report	Scrutiny Committee	Contact Officer
Page 264 Council)		Overview and Scrutiny Committee	Email: <a href="mailto:Claire.merchant@bridgend.gov.uk">Claire.merchant@bridgend.gov.uk</a>
13 Jul 26 (Subject to agreement at Annual Council)	<ul style="list-style-type: none"> <li>- Maesteg Town Hall TBC</li> <li>- Grand Pavilion TBC</li> </ul>	Communities, Environment and Housing Overview and Scrutiny Committee	Janine Nightingale Corporate Director, Communities Tel: 01656 643179 Email: <a href="mailto:Janine.Nightingale@bridgend.gov.uk">Janine.Nightingale@bridgend.gov.uk</a>
27 Jul 26 (Subject to agreement at Annual Council)	<ul style="list-style-type: none"> <li>- Budget Monitoring 2026-27 – Quarter 1 Revenue Forecast</li> <li>- Quarter 4 / Year End Performance 2025-26</li> <li>- Corporate Self-Assessment 2025-26</li> </ul>	Corporate Overview and Scrutiny Committee	Carys Lord Chief Officer - Finance, Performance and Change Tel: 01656 643302 Email: <a href="mailto:Carys.Lord@bridgend.gov.uk">Carys.Lord@bridgend.gov.uk</a>

Date	Title and Description of Report	Scrutiny Committee	Contact Officer
			<a href="mailto:Kelly.watson@bridgend.gov.uk"><u>Kelly.watson@bridgend.gov.uk</u></a>

**August - Summer Break – No Committee Meetings**

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# Agenda Item 16

By virtue of paragraph(s) 14, 16 of Part 4 of Schedule 12A  
of the Local Government Act 1972.

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