

# **Well-being of Future Generations (Wales) Act 2015**

## **Integrated Impact Assessment**

**(includes Equalities, Welsh Language, Sustainability and Biodiversity)**



Before completing the Impact Assessment **PLEASE REFER TO THE CORRESPONDING GUIDANCE DOCUMENT** which provides essential background information.

An Integrated Impact Assessment **MUST** be completed for:

1. Any project (i.e. something that has a start and end date and is different from day to day business).
2. Where you are implementing significant change e.g. service provision.
3. For any Council / Cabinet report that is not part of an above mentioned project or significant change.

<b>Title of Project / Report:</b>	Formula Funding Review
<b>Officer completing Impact Assessment:</b>	Joanna Lewis – LMS & Resources Manager
<b>Lead Officer / Project Manager:</b>	Ian Kent – Group Accountant Joanna Lewis – LMS & Resources Manager
<b>Service:</b>	School Planning, Support & Resources
<b>Impact Assessment completion date:</b>	10 <sup>th</sup> January 2021

**Please give a brief description of the aims of the proposal:**

In the Summer Term 2018 the Schools Forum was advised that Corporate Accountancy was to review the Formula Funding to school with an expected implementation date of 2020/2021.

The aim was to carry out an independent review of the Primary, Secondary and Special school formula funding to deliver a formula that is fair and equitable, needs based, efficient and simple to understand.

The review also sought to address any apparent funding inefficiencies i.e. , areas of the formula where the funding provided perpetuates inefficient use of monies.

It was agreed that there would be no additional costs due to this review and the total school quantum would remain the same but with the aim to ensure the existing funding is distributed more fairly within each sector.

It was also agreed by the Schools Forum that the overall funding across the 3 sectors, Primary, Secondary and Special should remain the same and any redistribution would remain within the sectors only and not across them.

## 1. Merthyr Tydfil Well-being Objectives

Does your proposal help to deliver any of the Council's Well-being Objectives identified below?

Well-being Objectives	Does your proposal have a positive or negative impact on the Council's Well-being Objectives? Please place an X in the relevant box			Why have you come to this decision? Please provide an explanation	What actions have been/will be taken to better contribute to positive impacts and/or mitigate any negative impacts?
	Positive	Negative	N/A		
<p><b><u>Best Start to Life</u></b> Children and young people get the best start to life and are equipped with the skills they need to be successful learners and confident individuals.</p>	X			<p>The LMS Scheme of delegation is a critical statutory framework for managing schools finances and delegated areas of service responsibility within a local authority.</p> <p>Any changes to the scheme have an impact on the Best Start to Life wellbeing objective since they have an impact on the running of schools and their finances/budgets.</p> <p>The changes proposed by this review are positive since they seek to provide schools with a formula that is fair and equitable, needs based, efficient and simple to understand.</p>	N/a
<p><b><u>Working Life</u></b> People feel supported to develop the skills required to meet the needs of businesses with a developing, safe infrastructure making Merthyr Tydfil an attractive destination.</p>			X	There is no direct impact of the proposal on this Well-being objective.	N/a
<p><b><u>Environmental Well-being</u></b></p>			X	There is no direct impact of the proposal on this Well-being objective.	N/a

Well-being Objectives	Does your proposal have a positive or negative impact on the Council's Well-being Objectives? Please place an X in the relevant box			Why have you come to this decision? Please provide an explanation	What actions have been/will be taken to better contribute to positive impacts and/or mitigate any negative impacts?
	Positive	Negative	N/A		
Communities protect, enhance and promote our environment and countryside.					
<b>Living Well</b> People are empowered to live independently within their communities, where they feel safe and enjoy good physical and mental health.			X	There is no direct impact of the proposal on this Well-being objective.	N/a
<b>Sources of evidence to support the above:</b>					

**2. Sustainable Development Principles (The Five Ways of Working)**

**Does your proposal demonstrate you have met the sustainable development principles (five ways of working)?**

<b>Five Ways of Working</b>	<b>How does your proposal demonstrate you have met the five ways of working?</b>	<b>Are there any additional actions to be taken to better contribute to the five ways of working and/or mitigate any negative impacts?</b>
<b>Long Term</b> - Thinking and planning for the long term.	Since the review proposes a formula that is needs based and addresses any apparent funding inefficiencies then the allocation of resources will be more appropriate over the short, medium and long term since the changing needs of the schools will be better reflected.	There should be a three year review period where the formula funding indicators are challenged as to whether they remain fit for purpose and this should inform ongoing iterations and improvements in various factors as required.
<b>Prevention</b> - Preventing problems before they happen.	A formula that is based on efficiency principles and seeks to address areas of the formula where the funding provided perpetuates inefficient use of monies will support the preventative agenda as money will not continue to be allocated where it is no longer needed and an inequitable distribution of monies is less likely to occur.	As above
<b>Integration</b> - Integrating with other strategies.	<p>This proposal is linked to the Raising Aspirations Raising Standards (RARS) strategy since it is linked to the Performance Management and Governance goal and partnership and collaboration theme.</p> <p>The work undertaken throughout the review and the role of the Schools Forum has been key to deliver the proposed changes and this has helped to strengthen further the role and function of the Schools Forum and makes a contribution towards addressing this commitment to action with the RARS.</p>	Consideration should be given to the WG review of formula funding across Wales together with a consideration of funding levels of schools in order to understand better emerging funding needs that may require recognition and additional funding through the formula.
<b>Collaboration</b> - Collaborating with others.	Collaboration has taken place between Corporate Accountancy, Education Officers, Schools Forum (and Working Group), and Headteachers in developing the proposed formula funding changes and finding jointly agreed solutions to deliver meaningful change.	N/a
<b>Involvement</b> - Involving people and communities.	All schools/governing bodies have been involved in the development of the proposals through formal consultation on the changes.	N/a

	<p>Discussions and engagement has also taken place with Heads during cluster meetings and various working groups.</p> <p>The Schools Forum and Schools Forum Working Group have been involved throughout the process and this includes Governor, Headteacher, chief officer representation from Learning and Finance and the Portfolio lead for Learning.</p>	
<p><b>Sources of evidence to support the above:</b></p> <p>Schools Forum Minutes/Working Group Minutes &amp; Briefing Papers  LMS Consultation paper  Emails to Heads / notes from meetings</p>		

**3. Protected Characteristics (including Welsh Language)**

**Does your proposal directly impact on service users, employees and/or the wider community, including the nine protected characteristic groups and Welsh language as identified below?**

Protected Characteristics	Does your proposal have a positive or negative impact on service users, employees and/or the wider community, including the nine protected characteristic groups and Welsh language? Please place an X in the relevant box			Why have you come to this decision? Please provide an explanation	What actions have been/will be taken to better contribute to positive impacts and/or mitigate any negative impacts?
	Positive	Negative	N/A		
Age	X			These changes, which provide fairer and more equitable funding to schools, positively impact on children & young people aged 3-16 who attend those schools.	N/a
Disability	X			The changes to the Special School Formula will positively impact on the Greenfield Special School and its	N/a

Protected Characteristics	Does your proposal have a positive or negative impact on service users, employees and/or the wider community, including the nine protected characteristic groups and Welsh language? Please place an X in the relevant box			Why have you come to this decision? Please provide an explanation	What actions have been/will be taken to better contribute to positive impacts and/or mitigate any negative impacts?
	Positive	Negative	N/A		
				pupils who have disabilities and / or SEN / Medical Conditions.	
Gender Reassignment			X	N/a	N/a
Marriage and Civil Partnership			X	N/a	N/a
Pregnancy and Maternity			X	N/a	N/a
Race			X	N/a	N/a
Religion or Belief			X	N/a	N/a
Sex (Gender)			X	N/a	N/a
Sexual Orientation			X	N/a.	N/a
Welsh Language			X	N/a	N/a
<b>Sources of evidence to support the above:</b>					

#### 4. Biodiversity

Does your proposal directly impact on Biodiversity?

Biodiversity	Does your proposal have a positive or negative impact on Biodiversity? Please place an X in the relevant box			Why have you come to this decision? Please provide an explanation	What actions have been/will be taken to better contribute to positive impacts and/or mitigate any negative impacts?
	Positive	Negative	N/A		
Maintain and enhance biodiversity and ecosystem resilience			X	N/a	N/a
Sources of evidence to support the above:					

## 5. Summary

As a result of completing this Impact Assessment, how many positive and negative impacts does your proposal have? This section should then be included in the related Council/Cabinet report.

Please see the example provided in the **guidance document**.

	Positive Impacts	Negative Impacts	Not Applicable
<b>1. Merthyr Tydfil Well-being Objectives</b>	1 of 4	0 of 4	3 of 4
<b>2. Sustainable Development Principles - How have you considered the five ways of working:</b> <ul style="list-style-type: none"> <li>• Long term</li> <li>• Prevention</li> <li>• Integration</li> <li>• Collaboration</li> <li>• Involvement</li> </ul>	5 of 5	0 of 5	0 of 5
<b>3. Protected Characteristics</b> ( <i>including Welsh Language</i> )	2 of 10	0 of 10	8 of 10
<b>4. Biodiversity</b>	0 of 1	0 of 1	1 of 1

### Summary:

Positive impacts have been identified against the Best Start to Life Well-being objectives, and against the long-term, prevention, integration, collaboration and involvement ways of working within the Sustainable Development Principle.

Positive impacts on children and young people and disability protected characteristics.

No negative impacts have been identified.

## 6. Actions

Based on the summary of your positive and negative impacts, identified in Section 5 above, will you need to make changes to your proposal to better contribute to positive impacts and/or mitigate any negative impacts? Please identify any further actions you will need to undertake to better contribute to positive impacts and/or mitigate any negative impacts.

What are you going to do?	Estimated completion date	Who will be responsible?	Timelines/Milestones e.g. 6 months/over a year, etc.	Progress

## 7. Version Control

The Impact Assessment should be used at the earliest stages of decision making, and then honed and refined throughout the decision making process. Please use the table below to keep a record of this process so that we can demonstrate how we have considered and built in the sustainable development principles where possible.

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1	Approval of Cabinet Report	10 <sup>th</sup> February 2021	

## 8. Sign off section

Approved by: Anthony Lewis

Job Title: Head of School Planning & Improvement

Approval date: 10<sup>h</sup> February 2021