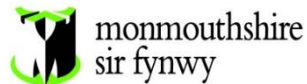


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Neuadd y Sir
Y Rhadyr
Brynbuga
NP15 1GA

Dydd Llun, 7 Gorffennaf 2025

Hysbysiad a gyfarfod

Pwyllgor Perfformiad a Throsolwg

Dydd Mawrth, 15fed Gorffennaf, 2025 at 10.00 am,
Council Chamber, County Hall, The Rhadyr USK

Nodwch y cynhelir rhag gyfarfod 30 munud cyn dechrau'r cyfarfod ar gyfer aelodau'r
pwyllgor

AGENDA

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3.	Fforwm Agored i'r Cyhoedd	
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6.	Alldro monitro refeniw a chyfalaf Craffu ar y sefyllfa gyllidebol (refeniw a chyfalaf) ar gyfer gwasanaethau sy'n dod o fewn cylch gwaith y pwyllgor, gan gynnwys diweddariad cynnar ar 2025/26.	125 - 196
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Paul Matthews

Prif Weithredwr

MONMOUTHSHIRE COUNTY COUNCIL
CYNGOR SIR FYNWY

MAE CYFANSODDIAD Y PWYLLGOR FEL A GANLYN:

County Councillor Jill Bond, West End;, Welsh Labour/Llafur Cymru
County Councillor Rachel Buckler, Devauden;, Welsh Conservative Party
County Councillor John Crook, Magor East with Undy;, Welsh Labour/Llafur Cymru
County Councillor Steven Garratt, Overmonnow;, Welsh Labour/Llafur Cymru
County Councillor Meirion Howells, Llanbadoc & Usk;, Independent
County Councillor Alistair Neill, Gobion Fawr;, Welsh Conservative Party
County Councillor Martin Newell, Town;, Welsh Conservative Party
County Councillor Paul Pavia, Mount Pleasant;, Welsh Conservative Party
County Councillor Peter Strong, Rogiet;, Welsh Labour/Llafur Cymru

Gwybodaeth I'r Cyhoedd

Mynediad i gopiâu papur o agendâu ac adroddiadau

Gellir darparu copi o'r agenda hwn ac adroddiadau perthnasol i aelodau'r cyhoedd sy'n mynychu cyfarfod drwy ofyn am gopi gan Gwasanaethau Democrataidd ar 01633 644219. Dylid nodi fod yn rhaid i ni dderbyn 24 awr o hysbysiad cyn y cyfarfod er mwyn darparu copi caled o'r agenda hwn i chi.

Edrych ar y cyfarfod ar-lein

Gellir gweld y cyfarfod ar-lein yn fyw neu'n dilyn y cyfarfod drwy fynd i www.monmouthshire.gov.uk neu drwy ymweld â'n tudalen Youtube drwy chwilio am MonmouthshireCC. Drwy fynd i mewn i'r ystafell gyfarfod, fel aelod o'r cyhoedd neu i gymryd rhan yn y cyfarfod, rydych yn caniatáu i gael eich ffilmio ac i ddefnydd posibl y delweddau a'r recordiadau sain hynny gan y Cyngor.

Y Gymraeg Mae'r Cyngor yn croesawu cyfraniadau gan aelodau'r cyhoedd drwy gyfrwng y Gymraeg neu'r Saesneg. Gofynnwn gyda dyledus barch i chi roi 5 diwrnod o hysbysiad cyn y cyfarfod os dymunwch siarad yn Gymraeg fel y gallwn ddarparu ar gyfer eich anghenion.

Nodau a Gwerthoedd Cyngor Sir Fynwy

i ddod yn sir ddi-garbon, gan gefnogi lles, iechyd ac urddas i bawb ar bob cam o'u bywydau.

Amcanion rydym yn gweithio tuag atynt

- Lle teg i fyw lle mae effeithiau anghydraddoldeb a thlodi wedi'u lleihau;
- Lle gwyrdd i fyw a gweithio gyda llai o allyriadau carbon a gwneud cyfraniad cadarnhaol at fynd i'r afael â'r argyfwng yn yr hinsawdd a natur;
- Lle ffyniannus ac uchelgeisiol, lle mae canol trefi bywiog a lle gall busnesau dyfu a datblygu;
- Lle diogel i fyw lle mae gan bobl gartref maen nhw'n teimlo'n ddiogel ynddo;
- Lle cysylltiedig lle mae pobl yn teimlo'n rhan o gymuned ac yn cael eu gwerthfawrogi;
- Lle dysgu lle mae pawb yn cael cyfle i gyrraedd eu potensial.

Ein gwerthoedd

- **Bod yn agored:** anelwn fod yn agored ac onest i ddatblygu perthnasoedd ymddiriedus
- **Tegwch:** anelwn ddarparu dewis teg, cyfleoedd a phrofiadau a dod yn sefydliad a adeiladwyd ar barch un at y llall.
- **Hyblygrwydd:** anelwn fod yn hyblyg yn ein syniadau a'n gweithredoedd i ddod yn sefydliad effeithlon ac effeithiol.
- **Gwaith tîm:** anelwn gydweithio i rannu ein llwyddiannau a'n methiannau drwy adeiladu ar ein cryfderau a chefnogi ein gilydd i gyflawni ein nodau.
- **Caredigrwydd** – Byddwn yn dangos caredigrwydd i bawb yr ydym yn gweithio gyda nhw, gan roi pwysigrwydd perthnasoedd a'r cysylltiadau sydd gennym â'n gilydd wrth wraidd pob rhyngweithio.

Canllaw Cwestiynau Craffu Sir Fynwy

1. Pam mae'r Pwyllgor yn craffu ar hyn? (cefndir, materion allweddol)
2. Beth yw rôl y Pwyllgor a pha ganlyniad mae'r Aelodau am ei gyflawni?
3. A oes digon o wybodaeth i gyflawni hyn? Os nad oes, pwy allai ddarparu hyn?
 - Cytuno ar y drefn holi a pha Aelodau fydd yn arwain
 - Cytuno ar gwestiynau i swyddogion a chwestiynau i Aelod y Cabinet

Cwestiynau'r Cyfarfod

<u><i>Craffu ar Berfformiad</i></u>	<u><i>Craffu ar Bolisi</i></u>
1. Sut mae perfformiad yn cymharu â'r blynyddoedd blaenorol? Ydy e'n well/yn waeth? Pam? 2. Sut mae perfformiad yn cymharu â chynghorau eraill/darparwyr gwasanaethau eraill? Ydy e'n well/yn waeth? Pam? 3. Sut mae perfformiad yn cymharu â thargedau gosodedig? Ydy e'n well/yn waeth? Pam? 4. Sut cafodd targedau perfformiad eu gosod? Ydyn nhw'n ddigon heriol/realistig? 5. Sut mae defnyddwyr gwasanaethau/y cyhoedd/partneriaid yn gweld perfformiad y gwasanaeth? 6. A fu unrhyw awdid ac archwiliadau diweddar? Beth oedd y canfyddiadau? 7. Sut mae'r gwasanaeth yn cyfrannu at wireddu amcanion corfforaethol? 8. A yw gwelliant/dirywiad mewn perfformiad yn gysylltiedig i gynnydd/ostyngiad mewn adnodd? Pa gapasiti sydd yna i wella?	1. Ar bwy mae'r polisi yn effeithio ~ yn uniongyrchol ac yn anuniongyrchol? Pwy fydd yn elwa fwyaf/leiaf? 2. Beth yw barn defnyddwyr gwasanaeth /rhanddeiliaid? Pa ymgynghoriad gafodd ei gyflawni? A wnaeth y broses ymgynghori gydymffurfio ag Egwyddorion Gunning? A yw rhanddeiliaid yn credu y bydd yn sicrhau'r canlyniad a ddymunir? 3. Beth yw barn y gymuned gyfan – safbwynt y 'trethdalwr'? 4. Pa ddulliau a ddefnyddiwyd i ymgynghori â'r rhanddeiliaid? A oedd y broses yn galluogi pawb â chyfran i ddweud eu dweud? 5. Pa ymarfer ac opsiynau sydd wedi eu hystyried wrth ddatblygu/adolygu'r polisi hwn? Pa dystiolaeth sydd i hysbysu beth sy'n gweithio? A yw'r polisi yn ymwneud â maes lle mae diffyg ymchwil cyhoeddedig neu dystiolaeth arall? 6. A yw'r polisi'n ymwneud â maes lle ceir anghydraddoldebau hysbys? 7. A yw'r polisi hwn yn cyd-fynd â'n hamcanion corfforaethol, fel y'u diffinnir yn ein cynllun corfforaethol? A yw'n cadw at ein Safonau Iaith Gymraeg? 8. A gafodd yr holl ddatblygu cynaliadwy, y goblygiadau cydraddoldeb a diogelu perthnasol eu hystyried?

	Er enghraifft, beth yw'r gweithdrefnau sydd angen bod ar waith i amddiffyn plant? 9. Faint fydd y gost hon i'w gweithredu a pha ffynhonnell ariannu sydd wedi'i nodi? 10. Sut fydd perfformiad y polisi yn cael ei weithredu a'r effaith yn cael ei gwerthuso?
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Cwestiynau Cyffredinol:

Grymuso Cymunedau

- Sut ydym ni'n cynnwys cymunedau lleol a'u grymuso i ddylunio a darparu gwasanaethau i gyd-fynd ag angen lleol?
- A ydym ni'n cael trafodaethau rheolaidd gyda chymunedau am flaenoriaethau'r gwasanaeth a pha lefel o wasanaeth y gall y cyngor fforddio ei ddarparu yn y dyfodol?
- A yw'r gwasanaeth yn gweithio gyda dinasyddion i egluro rôl gwahanol bartneriaid wrth ddarparu gwasanaeth a rheoli disgwyliadau?
- A oes fframwaith a phroses gymesur ar waith ar gyfer asesu perfformiad ar y cyd, gan gynnwys o safbwynt dinesydd, ac a oes gennych chi drefniadau atebolrwydd i gefnogi hyn?
- A oes Asesiad Effaith Cydraddoldeb wedi'i gynnal? Os felly a all yr Arweinydd a'r Cabinet /Uwch Swyddogion roi copïau i'r Aelodau ac eglurhad manwl o'r Asesiad o'r Effaith ar Gydraddoldeb (EQIA) a gynhaliwyd mewn perthynas â'r cynigion hyn?
- A all yr Arweinydd a'r Cabinet/Uwch Swyddogion sicrhau aelodau bod y cynigion hyn yn cydymffurfio â deddfwriaeth Cydraddoldeb a Hawliau Dynol? A yw'r cynigion yn cydymffurfio â Chynllun Cydraddoldeb Strategol yr Awdurdod Lleol?

Galwadau'r Gwasanaeth

- Sut fydd newid polisi a deddfwriaeth yn effeithio ar y ffordd mae'r cyngor yn gweithredu?
- A ydym ni wedi ystyried demograffeg ein cyngor a sut bydd hyn yn effeithio ar ddarparu gwasanaethau a chyllid yn y dyfodol?
- A ydych chi wedi adnabod ac ystyried y tueddiadau tymor hir a allai effeithio ar eich maes gwasanaeth, pa effaith allai'r tueddiadau hyn ei chael ar eich gwasanaeth/allai eich gwasanaeth ei gael ar y tueddiadau hyn, a beth sy'n cael ei wneud mewn ymateb?

Cynllunio Ariannol

- A oes gennym ni gynlluniau ariannol canolig a hirdymor cadarn yn eu lle?
- A ydym ni'n cysylltu cyllidebau â chynlluniau a chanlyniadau ac adrodd yn effeithiol ar y rhain?

Gwneud arbedion a chynhyrchu incwm

- A oes gennym ni'r strwythurau cywir ar waith i sicrhau bod ein dulliau effeithlonrwydd, gwelliant a thrawsnewid yn gweithio gyda'i gilydd i sicrhau'r arbedion mwyaf posibl?
- Sut ydym ni'n gwneud y mwyaf o incwm? A ydym ni wedi cymharu polisïau eraill y cyngor

i sicrhau'r incwm mwyaf posibl ac wedi ystyried yn llawn y goblygiadau ar ddefnyddwyr gwasanaeth?

- A oes gennym ni gynllun gweithlu sy'n ystyried capasiti, costau, a sgiliau'r gweithlu gwirioneddol yn erbyn y gweithlu a ddymunir?

Cwestiynau i'w gofyn o fewn blwyddyn i'r penderfyniad:

- A gafodd canlyniadau arfaethedig y cynnig eu cyflawni neu a oedd canlyniadau eraill?
- A oedd yr effeithiau wedi'u cyfyngu i'r grŵp yr oeddech chi ar y dechrau yn meddwl fyddai wedi cael ei effeithio h.y. pobl hŷn, neu a gafodd eraill eu heffeithio e.e. pobl ag anableddau, rhieni â phlant ifanc?
- A yw'r penderfyniad yn dal i fod y penderfyniad cywir neu a oes angen gwneud addasiadau?

Cwestiynau i'r Pwyllgor ar ddiwedd y cyfarfod ...

A oes gennym ni'r wybodaeth angenrheidiol i ffurfio casgliadau/i wneud argymhellion i'r pwyllgor gwaith, cyngor, partneriaid eraill? Os nad oes, a oes angen i ni:

- (i) Ymchwilio i'r mater yn fwy manwl?
- (ii) Gael rhagor o wybodaeth gan dystion eraill - Aelod o'r Bwrdd Gweithredol, arbenigwr annibynnol, aelodau o'r gymuned, defnyddwyr gwasanaeth, cyrff rheoleiddio...

Cytuno ar gamau pellach sydd i'w cymryd o fewn amserlen/adroddiad monitro yn y dyfodol.

SUBJECT: Draft Self-Assessment 2024/25
MEETING: Performance and Overview Scrutiny Committee
DATE: 15 th July 2025
DIVISION/WARDS AFFECTED: All

1 PURPOSE:

- 1.1 To provide the committee with an assessment of the council's performance during 2024/25. This will inform the development of the final report that will be presented to full Council in September and enable the committee to scrutinise the delivery of the objectives set in the Community and Corporate Plan.

2 RECOMMENDATIONS:

- 2.1 That the committee uses the draft self-assessment report to scrutinise the council's performance during 2024/25 and agree any areas they would like to examine in greater depth as part of their forward work programme.
- 2.2 That the committee provides feedback to help shape the development of the final self-assessment report which will be presented to Council in September
- 2.3 The committee is also invited to consider whether the report will enable the authority to meet the performance requirement outlined in the Local Government and Elections (Wales) Act 2021.

3. KEY ISSUES:

- 3.1 Monmouthshire County Council has a clear purpose to be a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. This is underpinned by six well-being objectives. These form part of the Community and Corporate Plan approved by Council in 2023. As well as tracking progress throughout the year, we undertake an annual self-assessment exercise. This ensures we can learn, understand where we need to make improvements and target actions accordingly. It also allows us to be held to account for delivery of our priorities.
- 3.2 The evaluation has concluded that the council is making good progress against five of the six objectives with one, a green place – assessed as adequate. It highlights some areas where performance and delivery is falling short of expectations and identifies areas for development. The assessment highlights a positive trajectory of improvement.
- 3.3 Inviting the scrutiny committee to consider this report during its development stage enables members to share their perspectives on whether the report, and the scores assigned to each objective, present an accurate assessment of progress.
- 3.4 Following scrutiny, the self-assessment report will be presented to Governance and Audit Committee which has a statutory role in scrutinising the self-assessment report to seek assurance on the effectiveness of the council's governance and performance management arrangements. The assessment will then be presented to Council on the 18th September.
- 3.5 The production of a self-assessment report is a requirement under the Local Government and Elections (Wales) Act 2021. The Act requires each local authority in Wales to keep

under review the extent to which it is meeting the 'performance requirements', that is the extent to which; it is exercising its functions effectively, it is using its resources economically, efficiently and effectively and its governance is effective for securing these.

- 3.6 The report evaluates the council's performance under each of the six Well-being Objectives embedded in the Community and Corporate Plan. The full self-assessment includes progress updates on twenty specific areas of activity that support delivery of the wider objectives. The council must make sure that its governance and enabling functions are working efficiently and effectively. Over the past year the authority has developed enabling strategies in areas including finance, people, assets and digital and data to ensure its resources are aligned behind the organisation's purpose and priorities.
- 3.7 A summary of the assessment is included as appendix 1 of this report with the fuller assessment as appendix 2. The following issues are highlighted:
- We have been working hard to improve life chances for people irrespective of their income or background. This includes providing targeted support to those experience disadvantage including increasing the number of flying start places and running the food and fun programme which provides free or subsidised meals and activities during school holidays.
 - We are taking local action to reduce our carbon emissions. Scorecards published by Climate Emergency UK show that Monmouthshire County Council has improved its work towards net zero over the past two years and are performing better than most councils in England and Wales.
 - Alongside this, residents have made a significant contribution to the green agenda by recycling 72.18% of household waste – one of the highest rates in the UK.
 - We've delivered a range of projects to develop a diverse local economy in which businesses and working people can thrive. In April 2024 we secured up to £8.4m to implement transport projects across the county to enhance access, safety and infrastructure. We made changes to local bus services, with a new operator taking over some routes and several services being adjusted to improve connections and efficiency.
 - We have allocated an additional £2M in our 2025-26 budget for infrastructure with the majority being spent on road improvements. However, like all parts of the UK we have a highways maintenance backlog that exceeds the available funding.
 - We have taken action to reduce homelessness. Last year we prevented 71% of households at risk from becoming homeless.
 - We are changing the way we provide social care by taking a more preventative approach, intervening earlier and bringing some provision back into the county. This represents a significant improvement over the past three years. We have overseen a gradual reduction in the number of children looked after from 209 to 190 over the past three years.
 - In 2024 our secondary schools achieved higher results than elsewhere in Wales. 27.5% of pupils across Monmouthshire achieved 5 or more GCSE at levels A*-A, compared with 18.1% for Wales. Pupils eligible for free school meals don't do as well however, they have higher attainment than their peers in Wales at Key stage 4.
- 3.8 Over the past year we have developed new enabling strategies to ensure we align all of our resources to deliver the priorities set out in the Community and Corporate Plan. We have evaluated these and concluded that we have sound arrangements in place to enable and support service delivery. The assessed scores have, on average, improved over the past year with five areas assessed as good or very good and two as adequate.
- 3.9 As a result of the self-assessment, we have identified several areas for development. These include:

- Develop more childcare places, including Flying Start and Welsh medium places.
- Develop solutions to tackle the rise in young people not in education, employment or training.
- Strengthen our capacity in digital and data
- Strengthen our procurement arrangements to ensure we can deliver the ambition within our Socially Responsible Procurement Strategy

3.10 The Performance and Overview Scrutiny Committee has an important role in scrutinising the council's performance. This report provides an assessment of performance during 2024/25 to assist the committee in fulfilling this role. The committee may also use the self-assessment to identify any further areas it may want to scrutinise in more detail as part of its forward work plan.

3.11 The annual self-assessment report will be complemented by a panel performance assessment once in an electoral cycle. This provides an opportunity to seek an external perspective to complement those of auditors and regulators. Monmouthshire's panel performance assessment is scheduled for February 2026.

4. RESOURCE IMPLICATIONS:

4.1 There are no additional resource implications as a result of this report. However, there may be implications in undertaking further actions identified in the self-assessment report. These would be subject to the usual council decision-making processes.

5. BACKGROUND PAPERS:

Local Government and Elections (Wales) Act 2021
Performance and governance of local authorities: statutory guidance
Community and Corporate Plan 2022-28

6. AUTHORS:

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Self-Assessment 2024/25 Summary

We want to be a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. We are committed to working with, and alongside, our communities to achieve this.

This self-evaluation is one of the ways we report on delivery of the commitments in our Community and Corporate Plan. It allows us to demonstrate progress and identify where we need to improve. Importantly it allows us to be held to account by elected councillors and local people.

Local authorities deliver a wide range of services. This evaluation cannot cover every one of them. Instead, we have focused on the six objectives in our plan. Beyond the detail you see here, we have scrutiny committees, business plans and performance measures in place. These allow us to be held accountable for all aspects of our work. We also rely on the work of our internal audit team and external regulators such as Audit Wales, Estyn and the Care Inspectorate Wales to provide an independent lens.



This is a summary of a fuller self-assessment which is available on our website (*not yet live*). The assessment also evaluates the effectiveness of the things that are not always visible to residents. These include financial management, use of assets, procurement and HR. Looking at these helps us identify areas for development for the years ahead. You can find these towards the end of this summary.

How well do we understand our local context and place?

Monmouthshire is a great place to live, work and visit. We have made a clear commitment to work with and alongside communities, empowering people to support each other and come up with long-term solutions. One example is the way we have engaged residents and businesses in the production of our replacement Local Development Plan. When approved, it will shape future land use in the county. This will increase opportunities for young people and families to live and work locally. It also contains ambitious commitments to deliver more energy efficient and affordable homes. We are also working in partnership on the production of placemaking plans to improve Monmouthshire's town centres.

In Autumn 2024, just under 1,500 people completed our residents survey. This helped increase our understanding of peoples' perceptions of their local council and the place they live. The survey gave us a baseline so we can measure whether we are getting better. In the past year we have launched the *Let's Talk Monmouthshire* website to make it easier for people to have conversations about the policies and changes that affect them. We will soon be inviting people to join a residents' forum so we can have more in-depth conversations.

How well are we achieving our agreed outcomes?

We have assessed progress against our objectives using a six-point scale. This scores each objective from 1 (unsatisfactory) through to 6 (excellent). After the local elections in May 2022 we took time to understand what matters to people and put the foundations in place for improvement. This included new strategies for climate, the economy and food. Many of the things we are committed to, such as improving the health of the Wye and Usk rivers, achieving net zero and tackling inequality are complex challenges that will not be solved quickly. This assessment shows a positive trajectory of improvement towards achieving those commitments over the past three years. The arrows below indicate the change in assessment over the past three years.

We have been working hard to improve life chances for people irrespective of their income or background. This includes providing targeted support those experiencing disadvantage. The sort of changes we want people to experience will not happen overnight so in the meantime we have also been putting in place solutions to mitigate the effects of inequality.

We have increased the availability of Flying Start childcare places. Since April 2023 an additional 210 children have benefitted from this. This has ensured that more children in disadvantaged areas can access key foundational learning. It also provides parents with free childcare allowing them to return to work leading to increased household incomes. The number of private childcare places in Monmouthshire has fallen. We recognise that accessing affordable childcare is challenging for some people. We are doing what we can by opening more facilities alongside our primary schools such as the one that opened in Trellech in early 2025.

Healthy, free meals at school can help to reduce food insecurity and improve equity in health and education outcomes. We have gone above our statutory duty to provide free breakfast and a freshly cooked meal at lunchtime to all primary school pupils. Take-up has been increasing but varies between schools. We are working with schools, parents and pupils to understand the reasons for this and doing everything we can to make sure as many people as possible take advantage of this offer.

We have provided targeted support to reduce inequalities, including providing free or subsidised play provision to 2,463 young people in the school holidays. Programmes include Food and Fun which provided 8,950 healthy meals to young people. We have also helped residents improve their health and fitness through the national exercise referral scheme. 66% of people who enrolled completed the programme. Three quarters of those reported improved well-being and happiness. We also worked with local people to develop and open the £2.9M Magor and Undy Community Hub which recognised a longstanding need in this growing community.

We are now working to make sure people who would benefit from support can be easily identified. One example is our participation in a pilot scheme to identify residents who may be missing out on means-tested benefits so that we can improve take-up.

We are taking local action to reduce our carbon emissions and play our part in tackling global warming. Despite facing systemic challenges to reach our ambition of achieving net zero by 2030 we are making progress.

We have been busy refitting our public buildings with LED lighting, solar panels and heat pumps. Over time this is reducing energy use and carbon emissions and will result in lower energy bills in the future. We have opened two purpose-built, energy efficient, buildings in the past year to replace ageing facilities; Severn View Park Home and King Henry VII 3-19 school, a carbon neutral secondary. Construction has pushed up our emissions in the short-term but we will benefit from the environmental and financial benefits for many years to come.

One of the other big sources of emissions is transport. We have increased the percentage of ultra low emission vehicles in our fleet from 8% in 2022 to 16% today. We will continue to increase this on a case-by-case basis. We are developing plans to increase the electric vehicle charging infrastructure in the county, including on street charging. We have also improved walking and cycling routes, often called active travel. We have attracted £6.5M in new funding to the county and have created or enhanced 19 routes in the past year bringing the total to over one hundred. Funding is now in place for a new bridge at Llanfoist.

Our residents have made a significant contribution to the green agenda by recycling 72.18% of household waste last year - one of the highest rates in the UK. We know that river health has been a huge problem

and has largely been caused by pollution upstream of our county. We have been working closely with Dŵr Cymru Welsh Water and they are now installing two multi-million pound phosphate stripping plants to improve the health of the Wye and Usk rivers which should result in significant improvements to future water quality.

We are making good progress with the resources we have available. Scorecards published by Climate Emergency UK show that Monmouthshire has improved its work towards net zero over the past two years and are performing better than most councils in England and Wales. We recognise that we are unlikely to achieve our ambition of becoming a net zero organisation by 2030 unless there is a significant increase in funding. However, the independent external assessment has provided assurance that we are putting the groundwork in place to ensure a positive future trajectory.

A thriving and ambitious place – Our Assessment: 4 (Good)



We have delivered a range of projects that are contributing to a local diverse economy in which businesses and workers can thrive. We have been working in partnership with others, including the Cardiff Capital Region, to make this happen.

We have produced a new local transport strategy for Monmouthshire which was approved in May 2024. This sets clear priorities for the next five years. We have also contributed to the development of the regional transport plan.

In April 2024 we secured up to £8.4m to implement transport projects across the county to enhance access, safety and infrastructure. We made changes to local bus services, with a new operator taking over some routes and several services being adjusted to improve connections and efficiency. We have worked with an active group of residents to make the case for investment in a new Magor Walkway station to improve connectivity. The UK Government has indicated that it will prioritise funding for this station bringing environmental and economic benefits to the area.

We have allocated an additional £2M in our 2025-26 budget for infrastructure with the majority being spent on road improvements. However, like all parts of the UK we have a highways maintenance backlog that exceeds the available funding.

We have established placemaking partnerships in all six towns in the county. These have involved local residents, business and voluntary organisations. We secured over £800k in funding from Welsh Government for town centre improvements in 2024/25. So far improvements have been made to 17 town centre buildings and commercial properties, bringing previously vacant properties back into use and helping to contribute to the vibrancy of town centres throughout our county. Projects include improvements to the youth centre in Caldicot and the refurbishment of a previously run-down building for use as a local community food project. 72% of people responding to our residents' survey felt very or fairly satisfied with their local area as a place to live.

We have developed a new Not in Education, Employment, or Training (NEET) Prevention Strategy. The strategy demonstrates our commitment ensuring better outcomes and opportunities for young people, through collaborative work. There has been an increase in the percentage of school leavers who were NEET from 1.8% (14 young people) in 2022 to 3.1% (25 young people) last year. We recognise this is an area we need to improve.

We have provided advice or assistance to 89 local businesses as part of our commitment to enable people of all ages and backgrounds to have the skills to do well in work or start their own business. This is below the target we had set ourselves and broadly unchanged from the number assisted in 2022. 79.9% of Monmouthshire's population is economically active. This is consistent with the position in 2022 and remains above the average rates for Wales and Great Britain.

We have taken action to reduce homelessness and have put plans in place to ensure the future supply of good quality, energy efficient homes.

We have prepared a replacement Local Development Plan and undertaken a public consultation on this. The plan sets out how land will be used for homes and employment up to 2033. In line with our climate commitments, all new properties will incorporate renewable energy generation technology, low carbon heating systems and ULEV charging points. As well as the environmental benefits this will reduce energy bills for these households. We have also committed to 50% of the homes on each site being affordable with a mix of housing types to meet local need.

The development of new properties has been limited in recent years due to planning restrictions resulting from high phosphate levels in rivers. We delivered 71 affordable homes in 2024/25, the highest figure in the past three years, bringing the total over that period to 198. We also granted planning permission for 108 affordable homes, more than double the total for the previous year.

High property prices and a shortage of affordable private rented accommodation have contributed to a rising homeless problem in Monmouthshire. We have adopted a rapid rehousing approach. In 2024/25 we successfully prevented 71% households at risk, from becoming homeless, a significant improvement on 2022 figure of 50%. We have also been acquiring or repurposing properties as alternatives to unsuitable and costly B&B accommodation. As a result, we have been able to reduce the number of homeless households placed into B&B from 90 in 2022 to 20 in 2024/25. Alongside this, we have reduced B&B use for families with children to zero.

We have worked with young people across the county to address concerns of knife crime and anti-social behaviour (ASB). We secured funding for a pilot scheme in Caldicot, increasing the support available from youth workers and targeting 9 young people involved in ASB through a total of 121 sessions. This has resulted in a 23% decrease in ASB incidents in the town. Overall, anti-social behaviour rates across the county have reduced marginally in the past three years, although the overall crime rate in the county has increased. The residents survey found that 90% of respondents felt safe in their local area during the day, while 66% felt safe after dark.

We are changing the way we provide services to ensure that Monmouthshire is a place where people's contributions are valued, they feel part of a community and are connected to others. We are doing this by taking a more preventative approach, intervening earlier and bringing some provision back into the county.

Social Services spending is taking an increasing proportion of our budget each year as a result of increasing demand and more complex needs. There are many factors that affect our health and well-being. We have committed to working in different ways to address the root-causes of this, becoming what is known as a Marmot Region. One of the ways we are doing this is by developing a more preventative approach where early help and enabling people is at the forefront. This was an area of development identified in our last self-assessment.

Early help is vital to prevent children coming into local authority care. We have established a coordinated approach to early intervention in children's social services. We have overseen a gradual reduction in the number of children looked after from 209 to 190 over the past three years. We are also developing more in-county residential and supported accommodation. One development has been completed and three more are in the pipeline. This allows children to maintain local connections and helps us reduce costs.

The recruitment of foster carers is a significant challenge across the UK. We have improved our offer to foster carers and advertised extensively. We have achieved a small increase, but this is not sufficient to meet our needs. 35.8% of placements of children looked after were with in-house foster carers. This is marginally less than in the previous year and below the target of 43% we set for ourselves

We want to help vulnerable older people regain their independence. We provided 309 reablement care packages last year compared to 240 in 2021/22. In 55.7% of cases this mitigated or reduced peoples' need for long-term support. When people do need longer-term care it can sometimes be hard to source the care they need. We have had a relentless focus on this working with our partners, and we are now meeting 98.2% of assessed needs for care at home, up from 96.6% in the previous year. We have more than halved the amount of unmet care hours since 2022.

In March 2024 we opened a new purpose-built specialist care home for people living with dementia. The home has 32 bedrooms for both long-term support and short-term support in the form of respite based on a relationship-centred care model.

Overall, 84.7% of adults in receipt of social services told us they were happy with the care and support they received. This is about the same as the previous year but around five percentage points lower than pre-pandemic levels.

A learning place – Our Assessment: 4 (Good)



We have worked with the regional Education Achievement Service to provide challenge, monitoring and evaluation of teaching and learning in schools. This is part of our commitment to make Monmouthshire a place where everybody experiences the best possible start in life and has the opportunity to learn, developing the skills and knowledge they will need to reach their potential.

In 2024 our secondary schools achieved higher results than elsewhere in Wales. The average capped 9 points score was 369.8 in Monmouthshire, compared to an average of 358.1 across Wales. Most of our pupils performed in line with their expectations. Overall, 27.5% of pupils across Monmouthshire achieved 5 or more GCSE at levels A*-A, compared with 18.1% for Wales. We also have fewer pupils leaving school with no qualifications.

We have developed a new Inclusion Strategy and an updated Additional Learning Needs (ALN) Policy to shape our work with children and young people. We have secured Shared Prosperity funding to deliver the Inspire Programme. This has enabled us to support to 340 young people since January 2023, providing life skills and qualifications which improve their future life chances.

We have focused on the needs of vulnerable learners, which includes those eligible for free school meals. These pupils are more likely to have further needs requiring support. Monmouthshire pupils who are eligible for free school meals performed better than those in other parts of Wales. However, the attainment of learners eligible for free school meals is lower than those who are not eligible.

We continue to work with schools to improve attendance. There has been a gradual improvement in primary school attendance since the pandemic. At the end of the academic year 2023/24 attendance was 93.6%; provisional data shows attendance has increased to 94.1% in the summer term 2024/25. Attendance in secondary schools has been slower to return to pre-pandemic levels. Attendance was 88.2% in the academic year 2023/24. Provisional figures show this had improved to 90.1% by the summer term 2024/25.

We have continued to develop our support to reduce and prevent behaviours that challenge in our schools. We have implemented a whole school approach to emotional and mental well-being. This helps schools to understand how they are best placed to promote well-being.

We have completed the construction of the new King Henry VIII 3-19 school in Abergavenny. The building is the first operationally net zero carbon all-through school in Wales, in line with our commitment to decarbonise our operations. It provides a hub for learning in Abergavenny, creating an environment in which young people can thrive as well as well improving leisure facilities for the wider community. It is anticipated that the development will reduce the number of pupils attending a secondary school out-of-county.

How effectively are resources being used to deliver our priorities?

Over the past year we have developed enabling strategies to ensure we align all of our resources to deliver the priorities set out in the Community and Corporate Plan. We have evaluated these and concluded that we have sound arrangements in place to enable and support service delivery.

The Well-being of Future Generations Act defines the core set of activities that are common to the corporate governance of public bodies. We have assessed each of these using our evaluation framework:

Corporate planning, performance and risk management. We assessed this as level 4 (Good) – Unchanged from last year.	↔
Financial planning. We assessed this as level 4 (Good). Unchanged from last year.	↔
Workforce planning (people). We assessed this as level 4 (Good). An improvement on last years' assessment score.	↑
Procurement. We assessed this as level 3 (Adequate). Unchanged from last year.	↔
Assets. We assessed this as level 5 (Very Good). An improvement on last years' assessment score.	↑
Digital and data. We assessed this as level 3 (Adequate). Unchanged from last year.	↔
Democracy and scrutiny. We assessed this as level 4 (Good). Unchanged from last year.	↔

Further detail on these is available as part of the full evaluation available at:
www.monmouthshire.gov.uk/improvement. *(not yet live)*

How effectively does the council work with stakeholders and partners on agreed outcomes?

Working in partnership is one of the ways we can achieve our objectives while delivering value for money. Key partners include Welsh Government, the Cardiff Capital Region and the Gwent Public Services Board. A review conducted by our Internal Audit Team identified a reasonable level of assurance was in place for the authority's governance arrangements based on a sample of partnerships. We have now developed a toolkit and guidance to strengthen our arrangements in this area.

Areas for Development

As a result of the self-assessment, we have identified a number of areas for development. These include:

- Develop more childcare places, including Flying Start and Welsh medium places.
- Develop solutions to tackle the rise in young people not in education, employment or training.
- Strengthen our capacity and capability in digital and data to deliver impact at scale.
- Strengthen our procurement arrangements to ensure we can deliver the ambition within our Socially Responsible Procurement Strategy.

Measuring Progress

We use a wide range of performance measures to evaluate our progress against our priorities. These are found throughout the assessment. We also track progress against a range of outcome measures at population level. Key measures are presented regularly to Cabinet and the Performance and Overview Scrutiny Committee so that we can actively manage performance and adjust delivery where we are falling short of our expectations.

What do you think?

We have used some of the feedback that we have received from other organisations to shape this report and would be delighted to hear your views to help us inform future assessments.

Please e-mail us: improvement@monmouthshire.gov.uk



Self-assessment Report 2024/25



monmouthshire
sir fynwy

Version Control

Title	Monmouthshire County Council Self-Assessment 2024/25
Purpose	To self-assess the council's goals and arrangements as required by the Local Government and Elections (Wales) Act 2021.
Owner	Chief Officer – People, Performance and Partnerships
Approved by	Draft - Not yet approved
Date	July 2025
Version Number	0.3
Status	Draft
Review Frequency	Annual
Next review date	2025
Consultation	Cabinet Strategic Leadership Team Performance and Overview Scrutiny Committee Governance and Audit Committee

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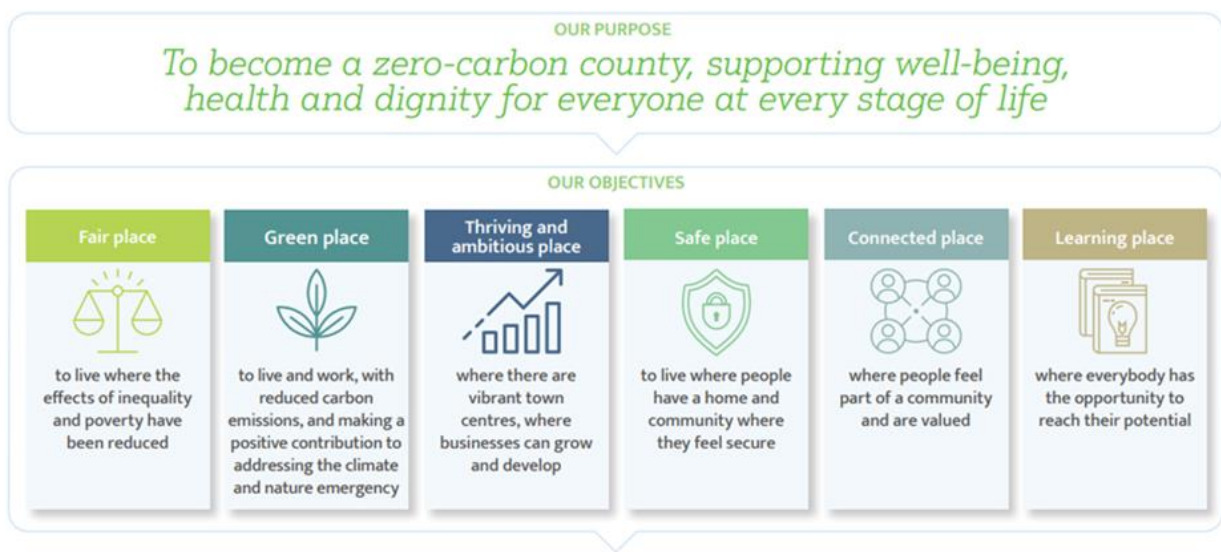
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Introduction

Our ambition for Monmouthshire County Council and the people it serves is set in our Community and Corporate Plan. We want to be a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. We will do this working with, and alongside, our communities. These are ambitious goals and it's vital that we track and evaluate our progress. We are clear about what we want to achieve, and this self-assessment is a critical tool in helping us achieve that. This will make sure we can respond to changing circumstances and opportunities and, most importantly, be held accountable for how well we are doing.

Local councils deliver a wide range of services. Some, such as roads and waste collection are universal, others such as social care are there at times of need. Many of our services act as a safety net when people are at their most vulnerable or are targeted at those experiencing disadvantage. Others, such as schools are there to help young people get the best start in life and make sure we are educating and developing the next generation of Monmouthshire residents. This evaluation cannot cover every single service. We have scrutiny committees and business plans in place to allow our councillors to hold senior officers and Cabinet members to account for those. Instead, it focuses primarily on how well we have delivered the six well-being objectives described in the Community and Corporate Plan.

Our Community and Corporate Plan – at a glance



The report also evaluates some of the key governance aspects that underpin our work such as the effectiveness of our workforce planning, use of assets and our financial management arrangements. It dovetails with the Annual Governance Statement, which is coordinated by our Chief Internal Auditor on behalf of the leadership team. It draws on audit and inspection work carried out by regulators including Audit Wales, Estyn and the Care Inspectorate Wales.

Like many public services we are facing budget pressures as a result of rising costs and increasing demands. We have made tens of millions of pounds in savings over recent years. We have had to take difficult decisions to balance our books but we always do this with the needs of communities in mind. This evaluation helps us understand the impact of the changes we make and allows us to learn from these so we can strive to continually improve what we do.

Our Self-Assessment

The Local Government and Elections (Wales) Act 2021, requires councils to keep their performance under review through self-assessment. We need to publish a report setting out the conclusions of the assessment once every financial year. This report predominantly looks back over the period from April 2024 to March 2025. It also makes reference to the cumulative effect of changes since 2022 when we began to develop our Community and Corporate Plan.

Effective self-assessment helps the council to continually learn and to achieve sustainable improvement and better outcomes for citizens, service users and its own workforce. This is focussed on three questions:

- How well are we doing?
- How do we know?
- What and how can we do better?

This is integrated with our annual reporting arrangements on the progress and impact we have made in meeting our well-being objectives, which is a requirement under the Well-being of Future Generations Act. Further details on the process of the self-assessment are shown in Appendix 2. We also produce a short summary of this assessment.

We welcome views from residents on this assessment along with any areas of our work that you think should be considered by the scrutiny committees that hold decision-makers to account. Please get in touch via:



improvement@monmouthshire.gov.uk



Matthew Gatehouse, Chief Officer People, Performance and Partnerships, Monmouthshire County Council, County Hall, Usk, NP15 1GA



@MonmouthshireCC

Understanding our local place

Monmouthshire is a diverse county. As a council we need to ensure we are meeting the needs of a wide range of groups, from residents to businesses. We strive to better understand the challenges facing our residents.

The context that we operate in is complex. Having a clear and current understanding of the social, economic, environmental, and cultural well-being in Monmouthshire is essential for the council to inform its purpose and priorities.

Local place	
How well do we understand our local context and place and has this informed our purpose and priorities?	How do we know?
The council has a good understanding of the well-being of its residents. We have access to and analyse a range of statistical information including but not limited to health, income levels and the local economy. We have also conducted a residents survey. We received 1,465 responses and have analysed the results to understand what respondents said about their local area, the council and their interactions with the council. The survey is one mechanism to help us understand residents' views, alongside a range of feedback collected across services, which provides a more detailed understanding of the council's services. Some, such as social care, libraries and building control also gather feedback from user surveys. However, we recognise that we do not have a comprehensive understanding of how well services and policies are meeting the needs of the people who use them given the breadth of our responsibilities. A study by Audit Wales concluded that, like other councils, we needed to do more to understand the impact of our services on residents. We facilitated the Make Your Mark survey, which a record-breaking 3,509 young people took part in for 2025. A youth conference was held in May 2025 that allowed young people from schools across the county to unpack and dig deeper into three priority areas identified in the survey - the cost of living, mental health matters and employment and skills. This allowed young people to formulate recommendations for decision makers, public services and young people themselves to address over the coming year. We have 46 ward councillors who represent the interests of their communities and bring forward local intelligence. This is supplemented by the use of a public open forum at scrutiny meetings and Council to allow residents to raise matters of concern. We have launched 'Lets Talk Monmouthshire' as a platform for consultations and engagement. This is enabling greater clarity of information for residents and providing a single place to visit for online consultations right across the organisation, to ensure residents do not miss the opportunity to engage. We need to grow this platform and encourage residents to register for regular updates, across each and every directorate. We also consult directly when we are planning service changes or considering action in a particular area, for example, we engaged with over 1,200 people to understand how we could make our communities more age friendly.	National Resident Survey Customer Surveys Audit Wales Report - <i>Use of Performance Information: Service User Perspective and Outcomes</i> Make Your Mark survey Informational from the National Statistics Office and other sources Population Needs Assessment Gwent Well-being Assessment & Plan Community and Corporate Plan Replacement Local Development Plan Town centre masterplans

The Community and Corporate Plan sets a clear commitment to work with and alongside communities, empowering people to support each other and come up with long-term solutions.

We have engaged extensively during the production of the replacement Local Development Plan. This will shape land use in the county. It will increase opportunities for the younger people to both live and work within Monmouthshire, creating a more balanced demography and socially and economically sustainable communities. We are also working in partnership on the production of town centre masterplans.

Once every five years we also conduct an extensive well-being assessment and population needs assessment with partners across Gwent. The Gwent Public Services Board (PSB) has engaged widely in the development of the well-being assessment and plan for the area.

Our Outcomes

The Community & Corporate Plan 2022-28 contains six well-being objectives which focus on the longer-term future of the county and aims to address complex challenges, in line with the Future Generations Act.

In assessing the performance of the six objectives, we have considered the extent to which:

- Our objectives contribute to the achievement of the seven well-being goals identified in the Well-being of Future Generations Act
- We are taking all reasonable steps to meet them.
- They remain consistent with the sustainable development principle and the five ways of working. More detail on the how the five ways of working are applied is provided in the progress on each goal later in this report.

It is important that outcomes are not considered in isolation since they can affect each other and need to be considered in an integrated way. How they integrate with each other is shown in Appendix 1.

We have included the following icons to illustrate each objectives contribution to the Well-being of Future Generations Act goals:



Prosperous Wales



Healthier Wales



Vibrant culture and thriving Welsh language



Resilient Wales



More equal Wales



Wales of cohesive communities



Globally responsible Wales

The long-term nature of our objectives means that the effects of some activity may not be clearly demonstrable over short timescales, and some activity will only have an impact over the longer term. Informed by the evidence gathered, we have assessed progress against each of our objectives on a scale of 1-6 based on the following principles:

Level	Definition	Description
6	Excellent	Excellent or outstanding – all performance measures have achieved the target set and all actions have been delivered
5	Very Good	Major strengths – a significant majority of actions and measures are on track. No more than one or two falling short
4	Good	Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved
3	Adequate	Strengths just outweigh weaknesses – the evidence of success marginally outweighs areas that are not on track. Some actions are behind schedule and some measures are falling short of planned targets
2	Weak	Important weaknesses – the majority of measures and actions have not been achieved
1	Unsatisfactory	Major weakness – in most areas, performance is assessed as moving in the wrong direction and the vast majority of actions have not been delivered

A guide showing the layout of the template we have used, and what each section means, is included as an appendix to the self-assessment.



A Fair Place to Live

What we want to achieve:

- Improved life chances for people regardless of income or background.
- Residents have better access to council services and support needed to live a healthy life.
- Citizens are able to participate in council and community decision-making and take actions which enable them to shape their own futures.

Strategic Assessment

We've been working hard to improve life chances for people irrespective of their income or background. This includes providing targeted support those experiencing disadvantage. The sort of changes we want people to experience won't happen overnight so in the meantime we've also been putting in place solutions to mitigate the effects of inequality on different groups of people.

Monmouthshire, on average, is a prosperous and affluent county. None of our communities are in the most deprived 10% in Wales. However, we have high levels of income inequality, and headline figures can mask pockets of need. We have therefore focused on providing targeted support wherever possible to mitigate the effects of inequalities. This includes programmes including Food and Fun and the expansion of Flying Start childcare to ensure children in the least affluent communities have access to foundational learning.

We have delivered our statutory duty to provide breakfast and a freshly cooked meal at lunchtime to all primary school pupils to ensure everyone has access to a healthy meal which is shown to have positive effects on health and education outcomes. Take up of this free offer has differed by area and we are working hard to address this.

We have developed a Strategic Equality Plan which sets objectives that value, and aim to make the most of, the abilities and contributions of everyone in our communities, irrespective of age, gender, race, sexual orientation or any of the other characteristics that make us who we are. We want to celebrate the diversity of our communities and make sure everyone feels welcome. We have committed to becoming a county of sanctuary for those fleeing war and persecution and will meet these individuals with compassion and understanding. We are fortunate to have excellent social capital with many community networks working to support the place they live, as shown by our high volunteering rate. We have continued to support our fantastic volunteers and supporting them to access the training they need.

Community & Corporate Plan Objective: A Fair Place to Live

A Fair Place to Live		
Fair place 	Evaluation Score:	Level 4 Good – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We have increased the support we provide to residents to improve their life chances and enabled our communities to develop the places they live. We have set plans to deliver most of what we to achieve. Our assessment shows we need to ensure all our interventions to achieve this objective are evidence-based, targeted, clearly communicated and evaluated to assess impact.
Why we focussed on this?		
Nobody should be left behind in Monmouthshire or feel their voice does not count. Many of our residents are prosperous and very capable of looking after themselves and their loved ones. However, this is not the case for all and in a rural county inequality is often more hidden than in urban places. We will increase the intensity of our work to help those who need support to live the lives they want.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Improved life chances for people regardless of income or background		
We have worked with childcare providers to increase the number of Flying Start childcare places available. This ensures that families in disadvantaged areas can access free childcare, giving children access to key foundational learning and providing parents with the opportunity to return to work. Having a positive early years education ensures strong foundations for young people. Despite increased efforts to expand the number of childcare places, due to the closure of a nursery setting and the cancellation or suspension of the registration of some childminding settings, the number of places has reduced. We will continue to work with existing providers to develop new settings and promote a career in childcare to encourage more individuals to join the childcare workforce. We have established a new childcare setting on the site of Trellech Primary School at the end of February 2025. This purpose-built setting will allow the provider to develop their provision and ensure their sustainability. We have undertaken feasibility studies for childcare provision on the site of Archbishop Rowan Williams Primary School; a Business Justification Case will be submitted to Welsh Government in Summer 2025. The development of an additional Cylch Meithrin has not progressed as planned due to a lack of suitable accommodation. This has meant that families in Monmouth and Chepstow are unable to access childcare, including Flying Start, through the medium of Welsh. We will continue to work closely with partners to develop Welsh medium provision in these communities. We have gone above our statutory duty to provide breakfast and a freshly cooked meal at lunchtime to all primary school pupils. Healthy, free meals at school help all children to learn and thrive irrespective of their background or income. Uptake of meals remains		Number of childcare and Flying Start places Free school meals uptake Community Development Team action plan Number of meal kits distributed Community fridge usage figures

varied across schools, on average 75% of pupils received the meals in the last year. We are working with schools, parents and learners to understand and remove any barriers to take-up. We have developed a targeted tackling poverty and inequality action plan. We partnered with Citizen's Advice, Warm Wales, local foodbanks and many others to give support, ideas and advice to residents to help with the cost of living. Increased community engagement has led to improved levels of trust, participation and collaboration with our communities. We recognise there is still more we can and will do to reach out to our communities to provide support to ensure a cohesive and joined-up approach. We secured £29k of funding from Welsh Government to support 30 Warm Spaces during 24/25. Over 700 people used these facilities providing immediate relief to those in need of support. We also distributed 100 Warm Packs to ensure no one in our community goes cold in Winter. We are working to ensure individuals in need of support can be easily identified. We have supported a local organisation to improve the data we hold to help us understand of service user needs. This will enable more responsive, targeted interventions. We are also taking part in the Local Authority Benefit Take-up Pilot which aims to identify residents who may be missing out on means-tested devolved and reserved benefits. We will use data to undertake targeted outreach campaigns to improve benefit take-up. This project is in the early stages. The Shared Benefits Team have begun the foundational work to integrate this tool into our systems. We want residents to have access to healthy meals, irrespective of their circumstances. We have distributed 360 meal kits to residents, which provided over 1,400 meals. These offered practical and dignified support, whilst also building confidence in cooking skills; 93% of participants reported a decrease in weekly food bills after getting involved. We are also a part of Monmouthshire Food Action Network helping to improve food security sharing knowledge, resources and data and providing support and advice on best practice. We have continued to support circular economy projects, including Benthyg libraries of things, which means residents can borrow or buy things that they only use occasionally. This saved residents approximately £28,028 last year. This resulted in a carbon saving of 12,402kg last year. We appointed two circular economy project enabling the development of Benthyg Caldicot which opened in December 2024. Benthyg Chepstow will be re-launched during the next year. We are continuing our commitment to wider circular economy initiatives which help people on lower incomes reduce expenditure. These include our repair cafes, swap shops, and bike repair workshops.	Carbon and monetary saving from Benthyg library of things
What we want to achieve: Residents have better access to council services and support needed to live a healthy life	
We are working with our partners in other public services to take action to reduce unfair and unjust inequalities in health. We have committed to becoming a Marmot region and recognise that the conditions in which people are born, grow, live, work and age play a major factor in their health. We are ensuring children have access to play by providing free or subsidised activities during the school holidays. We delivered free or subsidised play provision, which benefited 2,463 children this year. This includes our targeted Food & Fun programme which provides	School Holiday Play provision Food and Fun scheme National Exercise Referral Scheme take-up

two healthy meals and activities for children during the summer holidays, aiming to reduce the financial burden on families. This scheme supported 617 children throughout this year, serving 8,950 healthy meals. We have continued to help residents to improve their health and fitness levels through the National Exercise Referral Scheme. The percentage of participants who complete the scheme increased to 66% last year. Those completing the scheme reported improvements in balance, fitness levels and independence, and importantly their mental health; 75% of people reported that their general well-being had improved and that they felt happier. The positive experience of those taking part has resulted in an increase in Exercise Referral Memberships at our leisure centres from 300 in 2015 to 1,134 in 2025. We have continued to develop our relationship with the creative sector in Monmouthshire and have worked with them to identify their needs. We held our first annual celebration of the arts day at County Hall in April 2024 which showcased arts activity from across the county. The event brought together a range of artists and practitioners enabling us to understand their priorities and inform the development of our Cultural Strategy. We have not met our milestone to develop the strategy by March 2025 as we broaden our focus to ensure it is a strategy for the whole county and not just the council. We are preparing applications for new rounds of Arts Council Wales funding and have successfully secured funding from the Social Prosperity Fund to progress this work. We developed and opened the new £2.9 million Magor and Undy Community Hub in partnership with MUCH group. The development was based on extensive involvement of the community and is designed based on residents' feedback. The site provides spaces for community use and commercial events, as well as potential for small business growth. The MUCH group now occupies and manages the community hub for the direct promotion of social, cultural, leisure, sporting and other community activities.	Draft Cultural Strategy
What we want to achieve: Citizens are able to participate in council and community decision-making and take actions which enable them to shape their own futures	
We have developed a Volunteering Good Practice Guide to ensure a high-quality volunteering experience. We have also delivered bespoke training to over 570 volunteers and community groups through our Be Community project. This is ensuring volunteers are equipped with the skills they need. Our commitment has resulted in a retention rate of active volunteers of 89.7% and 95% of volunteers who responded to our annual survey agreeing that they felt their expectations for volunteering were being met. Ensuring volunteers are supported helps to maintain the social capital which brings huge benefits to communities. We have launched 'Lets Talk Monmouthshire' as a platform for consultations and engagement. This is enabling greater clarity of information for residents and providing a single place to visit for online consultations right across the organisation, to ensure residents do not miss the opportunity to engage. We need to grow this platform and encourage residents to register for regular updates, across each and every directorate. We are committed to tackling inequality. We have made achieved the accredited Disability Confident Employer (Level 2) status. We committed to encourage local firms to become accredited disability confident employers; currently 39 local firms are Disability Committed and 7 are Disability Employers reducing the inequalities faced by disabled people in accessing employment.	Annual Volunteer Survey 'Lets Talk Monmouthshire' Disability Confident Employer action plan County of Sanctuary working group Number of staff completing a Welsh language course

Council passed a motion in September 2023 committing us to formally becoming a county of sanctuary. Progress has been slower than planned and we anticipate securing accredited status towards the end of 2025. Supporting and promoting the use of the Welsh language is vital to ensuring it's growth. We are providing opportunities for our staff to improve their Welsh language skills; 53 staff members were completing a Welsh language course during 24/25. We currently have 392 members of staff that have some level of Welsh language skills and can use these to provide a service in Welsh to residents. There has been an increase in the percentage of the Monmouthshire population who can speak Welsh from 19.7% (March 24) to 21.4% (September 24). We are continuing to work with partners to promote the use of the Welsh language in our county.	Number of staff that have a level of Welsh speaking ability
Further areas for development identified through our 2024/25 self-assessment	
Develop more childcare places, including Flying start and Welsh-medium childcare provision	

Well-being of Future Generations Act impact						
Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
✓		✓	✓		✓	
Well-being Objective: A Fair Place to Live     Adopting community-focussed approaches promotes collaboration which in turn will support well-being. By working with communities, empowering people and ensuring they can access support we hope to prevent problems from occurring. Opportunities are plentiful in our county, so it is vital that everyone can be involved to maximise benefits to well-being. This should have a long-term benefit to individuals and communities. Our actions will have an integrated benefit for many aspects of the act, they will promote a Wales of cohesive communities and overall, help to create a more equal Wales.						
Measures of progress						
Milestone	Target for completion		Progress			
A new poverty and inequality action plan is approved by Cabinet	December 2024		It has been agreed that a new strategy or formal tackling poverty and inequality action plan is not the preferred option. The Community Development Team have developed a targeted action plan for 2025/26.			

All four library of things are fully operational	March 2025	Currently 3 of 4 sites are fully operational. Benthg Chepstow will be relaunched during 25/26 following a closure during 24/25.			
Establish two additional cylch meithrin	First established September 2025, second established January 2027	These have not been established as planned due to a lack of suitable accommodation.			
Establish childcare settings on the sites of Archbishop Rowan Williams Primary school and Trellech Primary schools	To establish the site at Trellech by March 2025 and Archbishop Rowan Williams by January 2027	The setting at Trellech Primary School has now been completed. A business case for the site at Archbishop Rowan Williams Primary School will be submitted in Summer 2025.			
Opening of the Magor and Undy Community Hub	August 2023	This has now been completed.			
A new inclusive Cultural Strategy is approved by Cabinet	March 2025	Changes to the nature of the strategy has meant that this milestone has not yet been met. A draft document is being prepared for consultation in 25/26.			
Disability Confident Employer (Level 2) Status attained	June 2024	This has now been completed.			
County of Sanctuary Status attained	December 2024	This has not yet been achieved. A multi-agency working group has been developed to drive forward progress			
Measure	Previous¹	Latest²	Target for 2024/25	Quick View	Comment
Percentage of pupils choosing to receive universal free school meals	75	75	77	↔	
i) The financial saving to communities (£) ii) Carbon saving (Kg Co2) from items borrowed through Benthg Library of Things	New measure	i)28,028 ii)12,402	i)20,000 ii)10,000		
Percentage of people participating in sporting activities three or more times a week	42	43	45	↑	Previous is 2021/22, latest is 2022/23.
Number of children benefitting from MonLife-run free or subsidised play provisions	New measure	2,463	3,525		This is a new measure introduced for 24/25. More accurate reporting has meant a revision to figures; targets will be adjusted in line with this change.

¹ Previous data is 2023/24 unless otherwise stated.

² Latest data is 2024/25 unless otherwise stated.

Number of local employers who make the disability confident employer pledge	35	46	70	↑	Previous is November 24, latest is March 25.
Percentage of people who volunteer	32	39	40	↑	Previous is 2019/20, latest is 2022/23.
Percentage of the population who can speak Welsh	16.6	19.7	18	↑	Previous is March 23, latest is March 24.

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance
Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short



Green Place to Live

What we want to achieve:

- Council operations are net zero by 2030 and local communities are supported to reduce their own carbon footprint
- Nature recovery, improved environmental and river health
- Sustainable local agriculture and farming practices with public services and residents consuming more local and seasonal produce

Strategic Assessment

We are taking local action to reduce our carbon emissions and play our part in tackling global warming. We face systemic challenges reaching our ambition of achieving net zero by 2030 but independent analysis from Climate Emergency UK shows that we are making good progress.

We need to celebrate the outstanding beauty of our county and ensure we are doing all we can to protect and conserve it. We are working with partners and our communities to enhance and protect biodiversity. We have empowered local nature champions to carry out their vision for local green space. The health of our rivers has suffered in recent years with high phosphate levels in the Usk and Wye. We have worked with partners to address this. Dŵr Cymru Welsh Water are now installing phosphate stripping plants at two areas in the county to improve the health of our rivers.

Carbon emissions per head of population in Monmouthshire are above the average for the UK. Residents have made a significant contribution to the green agenda by recycling 72.18% of household waste last year - one of the highest rates in the UK.

We have refitted many of our buildings with LED lighting, solar panels and heat pumps. We have recently opened the new King Henry VII 3-19 school, a carbon neutral secondary in Abergavenny. We are also expanding our use of electric vehicles when they are suitable for the job in hand. Over time these actions are reducing energy use and carbon emissions. We have also refreshed our Climate and Nature Emergency Strategy and have separated this into four clear action plans, including a decarbonisation plan. This better reflect the breadth of work being undertaken as we strive to meet our goal.

Community & Corporate Plan Objective: A Green Place to Live

A Green Place to Live		
Green place 	Evaluation Score:	Level 3 – Strengths just outweigh weaknesses – the evidence of success marginally outweighs areas that are not on track. Some actions are behind schedule and some measures are falling short of planned targets. We are continuing to implement projects that are contributing to achieving our objective, however we will need to do more and quicker to meet our ambition. The range of work that we are undertaking is helping us to understand the scale of the challenge and the path we need to take to reach our goal. We remain ambitious in our aim of becoming net zero by 2030. However, unless there is significant public investment, the evidence that we are gathering suggests that reaching our target will be extremely challenging.
	Why we focussed on this?	We recognise the outstanding beauty of Monmouthshire. As custodians of this stunning place we need to encourage residents and visitors to enjoy it, protect it and conserve it. The natural world in all its guises is the backdrop to our tourism and visitor economy. We will work with others to promote access to our special places whilst protecting the environment, support nature recovery, reduce our carbon emissions, reduce the risk of flooding and promote the circular economy. We also recognise that these are complex issues, and it will take decades rather than years to see the full impact of the changes we are making.
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Council operations are net zero by 2030 and local communities are supported to reduce their own carbon footprint		
Changes in our climate are linked to man-made greenhouse gas emissions, in particular carbon dioxide, and affect the natural environment, infrastructure, health, communities, the built environment and business. We recognise that achieving our collective target of net zero by 2030 will be challenging without significant public sector investment. The range of activity we are undertaking is helping us to better understand the scale of the challenge and target our action accordingly. We have updated our Climate and Nature Emergency Strategy. This includes an action plan showing on how we will reduce the council's carbon emissions. The Climate and Nature Emergency Steering Group is monitoring progress and using this to target future activity. The council's carbon emissions increased between 2022/23 and 2023/24 (data for 2024/25 is being collated and is not yet available). The main reasons for this increase are larger construction projects being undertaken in that period, the development of Severn View Park care home and Abergavenny 3-19 school. Whilst the construction of these buildings has increased emissions in the short term, they have been designed to ensure minimal environmental impact in the long-term, with Abergavenny school being net-zero and the new care home being far more energy efficient than its predecessor. We are currently undertaking an assessment of the carbon footprint of the council's purchased good and services; this will ensure we are targeting future carbon reduction activity in areas of spend with the highest emissions.		Climate and Nature Emergency Strategy Carbon emission reporting data Recycling and waste data Active travel route usage data Local Area Energy Plan

The emissions from the council's estate have been steadily decreasing in recent years. However, these are not at the pace needed to achieve net zero by 2030. We have commissioned and are completing decarbonisation surveys which will inform the development of our low carbon heat strategy and an action plan for our built estate. We are also developing a high-level costed decarbonisation plan, informed by this data, that will include costs for reducing operational emissions from the estate, fleet, and street lighting. This will quantify the scale of investment that is required to achieve our decarbonisation aims and will inform prioritisation of our resources based on cost and impact. A draft Local Area Energy Plan has been produced in conjunction with the Cardiff Capital Region (CCR). This outlines actions for key aspects of our energy transition locally, as well as joining up actions regionally and nationally. We have had challenges in progressing decarbonisation projects due to increased costs, complexity of delivery and accessing the specialist skills required. We have increased the capacity of our decarbonisation team which will help ensure a pipeline of ready-to-implement decarbonisation projects when funding becomes available. The emissions from our fleet and travel have increased. We are transitioning to Ultra Low Emission Vehicles at the point of renewal and where services need and funding permits. We have increased the percentage of our fleet which is ultra-low emission from 8% in 2022 to 16.5% today. We are developing a fleet transition plan. As we progress this, the electric vehicle charging infrastructure (EVCI) network across the county will need to be reviewed. We have identified potential requirements and assessed on-street charging options, with internal consultation underway, and we are using this to draft an overarching EVCI strategy. Climate Emergency UK assessed all UK councils on the actions they have taken towards net zero. While we have a range of mechanisms in place to assess our own performance the Climate Emergency UK audit is another way to gauge our progress. Our overall score from the 2025 assessment was 46% of potential targets achieved, an increase from 37% in 2023, and we are amongst the highest scoring local authorities in Wales. Our scores improved in most areas in 2025, although a couple of sections were lower than in 2023. We have increased the percentage of municipal waste in the county that was sent for recycling, reuse or composting to a provisional rate of 72.18%. This is above the statutory target of 70%. This is due to continued participation of residents with household recycling. The overall amount of waste generated per person increased from 198kg in 2022/23 to 202kg in 2023/24 and remains above the Wales average. Our score for Waste Reduction & Food in the Climate Emergency UK assessment was the highest in the UK, at 93%. We are improving and expanding our active travel network to help our communities to reduce the carbon produced from travel. We currently have over 100 active routes in place. We have utilised over £6.5m of funding to and have created or enhanced 19 Active travel routes this year, above our target of 14. We have live journey counter information to monitor the use of our network; these found a 4.1% increase in active travel usage in 24/25 compared with the previous year. We have continued to support low-income households to access grant funding to improve the energy efficiency of their homes. We are promoting the Eco4 scheme which provides funding for low-income households and those living with medical conditions worsened by damp or cold to access energy efficiency improvements.	Climate Emergency UK Assessment
What we want to achieve: Nature recovery, improved environmental and river health	

The natural world in all its guises is the backdrop to life in Monmouthshire. We need to ensure we are doing all we can to protect and conserve it. We have reviewed and updated our Climate and Nature Emergency Strategy to include a biodiversity and ecosystems resilience action plan. This sets out how we will maintain and enhance biodiversity and ecosystems resilience through the council's operations. We have created a Local Nature Recovery Action Plan (NRAP) and Green Infrastructure strategy and have undertaken a consultation to help shape the plans. We worked with Monmouthshire Local Nature Partnership to produce the local NRAP which provides a roadmap for local conservation efforts, offering practical steps to reverse biodiversity decline and strengthen ecosystem resilience across Monmouthshire. The plan aims to support everyone, from individuals and communities to businesses and conservationists. The Green Infrastructure Strategy aims to create a connected network of green spaces to improve health, support biodiversity, enhance ecosystem resilience, increase climate resilience, preserve our landscapes, and promote sustainable economic growth. We have delivered 23 Green Infrastructure nature-based projects across the county, above our target of 20, these delivered a variety of benefits including ecosystem resilience and climate change mitigation. We continue to actively participate in partnerships, including coordinating of the Monmouthshire Local Nature Partnership and roles in the Usk catchment partnership. We have supported the delivery of 25 nature recovery projects, including improvements to green spaces, purchase of machinery to facilitate meadow management, and a swift tower. We have empowered local nature champions to carry out their existing vision for local green spaces and the wider community to enhance biodiversity. We have fostered conversations with local community groups about protecting local nature and biodiversity planting and provided opportunities for primary schools and gardening volunteers to help with enhancement of green spaces outside their normal sites. The health of our rivers has suffered in recent years. Phosphate targets for the Usk were being failed at a rate of 88% and the Wye at 68%. We have worked with partners to address this, and Dŵr Cymru Welsh Water is now installing phosphate stripping plants to improve the health of our rivers. This is enabling appropriate development to be permitted within these areas where it was previously restricted and has contributed to the increase in the number of affordable homes granted planning permission. We have developed an action plan showing how we will work in partnership to improve the health of our rivers and oceans. The Climate and Nature Emergency Steering Group will monitor progress against this. With extreme weather events becoming more frequent it is important to support communities at risk of flooding. We have developed and updated emergency flood response plans for sites across the county and regularly engage with our communities through one-to-one sessions and community meetings. We have also continued to operate as the Sustainable Drainage Systems (SuDS) Approving Body to ensure all new developments in the county have a sustainable drainage system in place, eliminating an increased risk of flooding whilst also providing water quality and biodiversity benefits. We are developing a Local Flood Risk Management Strategy and action plan, which assesses flood risk on a catchment-based approach and will identify Strategic Flood Risk Areas (SFRA). We plan to consult on the strategy in the Autumn.	Nature Isn't Neat project Gwent Green Grid Partnership Biodiversity and ecosystems resilience action plan
What we want to Achieve: Sustainable local agriculture and farming practices with public services and residents consuming more local and seasonal produce	

We have created a Local Food Strategy that sets out how we will facilitate access to council land for growing food, including allocating land for community use. We have facilitated the Welsh Government's Allotment Support Grant which has supported over 130 allotment plots to be improved, created or revived across six different sites throughout Monmouthshire. We are committed to transforming our agriculture to be more regenerative and sustainable. We are supporting the Regen Ben mentoring scheme, with three farms receiving mentorship. This is helping participating farms to move their operations onto more regenerative lines, building soil health and improving water quality. The Talk Farm Regen Monmouthshire continues to attract support from volunteers in the local farming community. We have worked with local farmers as part of the Welsh Veg in Schools pilot scheme to bring more local produce into schools. This has provided pupils in ten participating schools with nutritious, local food no matter their socio-economic background. The project has also supported the development of new safety standards and new logistics. Growers are expanding their enterprises, and new farmers are diversifying into organic horticulture to participate.	Local Food Strategy Welsh Government Allotment Support Grant
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Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals

Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
	✓	✓		✓		✓

Well-being Objective: A Green Place to Live



Monmouthshire is a beautiful place, with a stunning natural and built environment. We have a collective responsibility to ensure this is available for future generations to enjoy so our plans must be focussed on the **long-term** and look to **prevent** problems from occurring in years to come. **Involvement** is required with partners and communities to maximise the potential of the environment within the county. Working in **collaboration** with organisations who can enhance our environment will provide expertise in all aspects of our work, for example this will allow us to trial the latest technologies in renewable energies. Creating a healthy and resilient area for people to enjoy demands the **integration** of this objective as the environment within Monmouthshire forms such an important part of achieving a range of goals.

Measures of progress

Milestone	Target for completion		Progress		
New climate and nature emergency strategy approved by Cabinet	May 2024		This has now been completed.		
Food strategy developed and approved	May 2024		This has now been completed.		
Increased use of seasonal and/or local produce in schools, care homes and domiciliary care	May 2026		Work with partners is ongoing to increase the use of seasonal, local produce in schools and play activities across the county.		
Measure	Previous	Latest	Target for 2024/25	Quick View	Comment
Carbon emissions (kgCO ₂ e) from the council's assets and operations ⁱ	44,248	54,859	36,000	↓	Latest figure is 2023/24, previous is for 2022/23. 2024/25 data will be included when available.
Percentage of our local authority fleet which is ultra-low emission	14	16.5	12	↑	
Capacity (MW) of renewable energy equipment installed on the council's estate	6.598	6.722	6.7	↑	Latest figure is 2023/24, previous is for 2022/23. 2024/25 data will be included when available.
Amount (kwh) of renewable energy generated from Council installations	4,783,567	5,271,000	4,857,500	↑	Latest figure is 2023/24, previous is 2022/23. 2024/25 data will be included when available.
Number of active travel routes created or enhanced	20	19	14	↓	These reflect annual figures and are linked to the funding available each year and the size and scale of projects delivered.
Percentage of municipal waste sent for recycling, reuse or composting	71.8	72.2	70	↑	Latest is provisional 2024/25 data.

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short



A Thriving and Ambitious Place

What we want to achieve:

- Vibrant town centres which bring people together and attract investment
- People of all ages and backgrounds have the skills to do well in work or start their own business
- Sustainable Transport and Infrastructure

Strategic Assessment

We have delivered a range of projects that are contributing to a local diverse economy in which businesses and workers can thrive. We have been working in partnership with others, including the Cardiff Capital Region, to make this happen. Monmouthshire has a strong local economy and is well placed for growth in Welsh terms. The employment rate is higher than both the UK and Wales averages. We also have a highly qualified population, with over half of Monmouthshire's working age population qualified to level NVQ4 and above. However, the lack of higher education establishments in the county, combined with high property and rental prices, results in many young people leaving the county. We have developed an Economy, Employment and Skills Strategy which sets out how we equip young people with the skills to enter the workforce and how we will work with partners to create training and employment opportunities.

Our towns and high streets have faced many challenges in recent years. We have established placemaking partnerships in all six towns and have secured additional funding to improve commercial properties. We are committed to supporting local businesses through these challenges and promoting the creation of new business. We provided support to pre-starts and existing businesses throughout this year. It's important that we support the amenities that attract people to our towns. We have continued to make improvements to the accessibility of our visitor sites as part of our Heritage Strategy and are working to understand and address barriers to attendance.

Public transport is limited in the county. This results in an over-reliance on cars, which can be a barrier to accessing training and employment. We have developed a Local Transport Strategy which sets a clear ambition for transport infrastructure in Monmouthshire over the next five years. We have made changes to local bus services to improve connections and efficiency and expanded our active travel network. We also have allocated an additional £2M in our 2025-26 budget for infrastructure with the majority being spent on road improvements. However, like all parts of the UK we have a highways maintenance backlog that exceeds the available funding.

Community & Corporate Plan Objective: A Thriving and Ambitious Place

A Thriving and Ambitious Place		
Thriving and ambitious place 	Evaluation score:	Level 4 – Good – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We have developed our strategies to deliver the objective. We have provided support for residents and businesses to gain new skills, develop and grow. We have delivered projects to enhance connectivity in the County. We are building from a strong economic and skills base. Our assessment shows we need to grow this base and provide targeted support and projects for people, business and places that need them most.
	Why we focussed on this?	Our starting point is a comparatively strong one. Monmouthshire has a strong local economy and is well placed for growth in Welsh terms. There is strength in a number of key sectors which are highlighted and supported at a national level. Employment rates are high, as are qualification levels. But more can be done. Monmouthshire can be more vibrant. The conditions exist to achieve this. We will work with national, regional and local partners to increase investment, improve connectivity and continue the development of an economy which is thriving, ambitious and enterprising.
Page 33	How well are we achieving our agreed outcomes?	How do we know?
	What we want to achieve: Vibrant town centres which bring people together and attract investment	
Page 33	Attracting residents and visitors to our town centres is vital for the local economy. We are committed to ensuring that town centres remain vibrant and welcoming places that meet the needs of the local communities, businesses and visitors. We have established placemaking partnerships in all six towns in the county. Building these strong links ensures developments are informed and aligned with the needs of our communities. We have worked with partners and stakeholders to adopt Placemaking Plans in Usk and Chepstow, and are developing plans for Monmouth, Abergavenny and Magor with Undy. These plans aim to create a vibrant and sustainable future for town and village centres, informed by local residents, business and voluntary organisations. We have secured over £800k in funding from Welsh Government to drive forward town centre regeneration projects. Throughout this year we have used grant funding to provide a flexible grant scheme to enable building owners and businesses to bring vacant commercial space back into use and improve the functionality, performance and appearance of town centre buildings. 17 buildings or commercial units across the county benefitted from this grant, including the refurbishment of a previously run down building for the use of a community fridge and food club, and improvements to youth centres. A range of town centre public realm/connectivity projects have also been delivered to improve the functionality and appearance of town centres, including installation of steps and walkways to improve connectivity between towns and visitor attractions and widening of walkways to improve accessibility.	Placemaking plans Flexible grant scheme delivery and public realm improvements Tourism data

We are making improvements to our heritage sites, including their accessibility. We have launched a small grants programme to support access improvements at visitor attractions and events throughout the county. We continue to provide concessionary prices at our attractions, including for foster carers, to reduce the financial barriers to attending. Inclement weather has affected attendance at open-air spaces during this year, with 189,541 visitors to our heritage and culture sites in 2024/25, falling slightly below our target. This tourism sector is important in supporting employment and the economy in the county. We have continued to assist the sector and promote event and attractions in the county. The number of jobs supported by tourism increased from 3,356 to 3,462 in 2023. The economic impact of tourism increased to £329.8m in 2023, a 2% increase on the previous year, demonstrating that the resilience of the sector in Monmouthshire.	
What we want to achieve: People of all ages and backgrounds have the skills to do well in work or start their own business	
Monmouthshire values all of its citizens and the people who work for our businesses. In 2023 we developed an Economy, Employment and Skills Strategy. We are committed to helping people of all ages and backgrounds develop the skills needed by new and established businesses helping them to grow and thrive. We have provided support to people who want to start their own business, funded by the UK Shared Prosperity Fund (SPF). We assisted 89 pre-start and existing businesses during the year, below our target. We had a staffing vacancy that reduced our capacity to provide support in the year. We have filled this vacancy and using our new customer relationship management system to promote our services more widely to existing businesses. We have continued to provide employment support, with a specific focus on addressing skills in shortage areas. We have held successful Construction Skills Certification Scheme weekly drop-in sessions in. 70% of those enrolling completed the assessments to gain the green labourer's card, promoting career paths in the construction sector. We have addressed barriers to employment and supported 82 people to gain employment this year, above our annual target. We are running a number of projects, funded by the UK Shared Prosperity Fund, such as business coaching and advice. We are awaiting announcements regarding the future of the longer-term funding that supports this work. We have developed a new Not in Education, Employment, or Training (NEET) Prevention Strategy. The demonstrates our commitment to preventing young people ending up without education, training or employment, ensuring better outcomes and opportunities, through collaborative work with stakeholders. We have supported ten young people into employment in the year, this is fewer than our target. There is reduced capacity across the NEET prevention team and so priority is given to those most in need of support. There has been a significant increase in the number of Year 11 and Year 13 leavers not in education, employment or training; 3.1% of Year 11 leavers were NEET higher than the 1.8% in the recent years. We are analysing the reasons for this, including tracking individual journeys, and will use this information to target support with partners as part our NEET prevention strategy. The latest data shows that 55% of Monmouthshire residents are qualified to level 4 of the national framework (the highest level), compared to 45% for Wales and 48% for Great Britain. However, the ratio of jobs to population in Monmouthshire is lower than the figures for Wales and the UK as a whole. One of the reasons behind this is a shortage of the new employment sites needed to grow opportunities. We have developed a deposit replacement Local Development Plan, which has been agreed by Council for consultation, in which new employment sites are highlighted to address the shortfall. We are seeing positive signs of progress in the Monmouthshire economy, such as an improvement in our economic position as	Entrepreneur and business assistance Self-employment rate Employment support

measured by the UK Competitiveness Index, and sustained levels of people economically active: 79.9% of people in Monmouthshire are economically active which is above the rates for Wales and Great Britain.	
What we want to achieve: Sustainable Transport and Infrastructure	
Good transport and infrastructure are vital to our communities and economy, enabling access to a wide range of services and opportunities for all residents. We adopted a new Local Transport Strategy in May 2024 setting out a clear ambition for transport infrastructure in Monmouthshire over the next five years. We have been awarded up to £8.4m to implement transport projects to enhance access, safety and infrastructure. We have used the funding on community road safety training, bus infrastructure projects and road resilience projects to mitigate and adapt to the effects of climate change. We are using the largest portion of this funding on Active Travel work, including the installation of an active travel bridge in Llanfoist. As well as infrastructure improvements, we are using the funding to improve safe routes in the community and supporting public transport improvements, such as real-time interfaces. We amended bus timetables in September to ensure that public buses were a viable option for those pupils wishing to travel to school who are not eligible for free home to school transport. This has ensured a suitable and sustainable travel option for those pupils. We also utilised Welsh Government funding to increase the frequency of some public bus services to ensure a well-connected county for our residents. In March 2025, Cardiff Capital Region (CCR) opened its consultation on the draft Regional Transport Plan (RTP) to shape transport provision in Southeast Wales, aimed at unlocking opportunities, connecting people and businesses, and supporting the creation of jobs. The Regional Transport Plan includes various schemes identified within the South East Wales Transport Commission led by Lord Burns. We are focussed on ensuring the needs and ambition of Monmouthshire are included in this plan as it will be key to securing funding for the delivery of our Local Transport Strategy. If our transport schemes are not prioritised, there is a risk we may not be as successful going forward. In June 2025, the UK Government allocated £445m of resources to enable rail infrastructure improvements across Wales, this includes the delivery of the recommendations made by the South East Wales Transport Commission. The upgrades to the South Wales Mainline will increase train service frequency and the provision of five new railway stations – including Magor Walkway. We will continue to work with the Welsh Government and our neighbouring authorities to deliver the other recommendations of the Commission which includes the provision of a new link road between the M48 and the B4245 to enhance park and ride facility at Severn Tunnel Junction Railway station. A motion was passed at Monmouthshire County Council’s full council meeting, expressing concerns over the ban on Heavy Goods Vehicles (HGVs) crossing the M48 Severn Bridge. The council recognises the urgent need to address the potential impact on local business and the wider community and will be urging UK and Welsh Government to work quickly to develop new measures for the bridge. Monmouthshire is not alone in facing challenges maintaining its highways. There is a significant backlog in roads maintenance across the UK. We simply cannot afford to fund all the necessary improvements from our capital budget. These have varying levels of risk associated with them. We commission independent assessments of key highways infrastructure, and these have enabled us to prioritise maintenance expenditure in line with our maintenance strategy. We are also undertaken surveys of road and pavements to gain a further detailed understanding of their condition. Welsh	Local Transport Strategy Highway planned programme maintenance

Government's Local Government Borrowing Initiative will allow us to borrow money to fund an increased number of improvements projects. This will still not meet the identified funding gap required.	
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Further areas for development identified through our 2024/25 self-assessment

Understand the reasons for the rise in young people Not in Employment, Education or Training

Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
✓	✓		✓	✓	✓	✓

Well-being Objective: A Thriving and Ambitious Place



This goal is aimed at the **long-term** viability of Monmouthshire as a thriving place to live, work and visit. The location of Monmouthshire as the gateway to South East Wales means we must embrace working with neighbouring areas to maximise opportunities. Keeping Monmouthshire thriving and well-connected promotes **integration** and impacts on the social, economic, environmental and cultural well-being of the county. This requires **collaboration** with local businesses and other organisations, and **involvement** from the local community to maximise opportunities. Considering the global well-being of Wales is also important and this goal focuses on ensuring decisions are made with future generations in mind and takes a **preventative** approach to enable the retention of young people.

Measures of progress

Milestone	Target for completion	Progress
Development of draft Placemaking Plans for Abergavenny, Magor with Undy and Monmouth	March 2025	Draft plans have been developed for each area with partners and residents and consultation undertaken in each of the local areas.
Develop Economy, Employment and Skills Strategy	February 2024	This has now been completed.
Develop and approve NEET strategy	November 2024	This has now been completed.
Local Transport Plan supporting modal shift is produced	May 2024	This has now been completed.

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Measure	Previous	Latest	Target for 2024/25	Quick View	Comment
Number of NEET young people supported into employment	New measure	10	25		This is a new measure for 24/25. Targets will be assessed to ensure they reflect capacity for delivery of projects.
Number of pre-starts and existing businesses assisted during the year by the local authority and its partners	165	89	180	↓	These reflect annual figures and are linked to the funding available each year and the size and scale of projects delivered. This was fewer than targeted due a staffing vacancy reducing our capacity to provide support. The vacancy has now been filled.
Number of working age people supported into employment during the year through action by the local authority	115	82	60	↓	These reflect annual figures and are linked to the funding available each year and the size and scale of projects delivered.
Percentage of school leavers not in education, employment or training ⁱⁱ	1.8	3.1	1.5	↓	Work is underway to understand the drivers of this increase.
Percentage of care experienced young people who have completed at least three months in education, training or employment	52.5	65	60	↑	Measure amended in line with Welsh Government Performance Improvement Framework to include care leavers up to the age of 21 from 19.
Total number of visitors to our heritage & culture sites	194,700	189,541	198,000	↓	
Number of schools who reported that MonLife Heritage Learning has had a positive impact on teaching and learning in their school	10	11	10	↑	

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short

A Safe Place to Live



What we want to achieve:

- Increased supply of good quality affordable housing
- Reduce the number of people who become homeless
- A more energy efficient housing stock with a lower carbon footprint
- Communities in which everyone feels safe and respects each other

Strategic Assessment

We have taken action to reduce homelessness and have put plans in place to ensure the future supply of good quality, energy efficient homes. House prices here are some of the highest in Wales, with the average property costing over £320k or 8.5 times average earnings in the county. This makes it difficult for many people to buy or rent locally. That is why affordability is at the heart of our ambition in our proposed replacement Local Development Plan for our county. The delays in adopting this plan have limited the progress we have made in increasing the supply of affordable homes.

High property prices, a shortage of affordable private rented accommodation and the increasing cost of living have all contributed to a rising homelessness challenge in the county. Working collaboratively with partners we have implemented a Rapid Rehousing Transition Plan. This has increased homeless prevention. We have worked with social and private landlords and started to re-purpose our own properties to increase the availability of temporary and settled homes for homeless households which has led to reduced use of unsuitable B&B accommodation including the elimination of it to house 16 and 17 years olds and families with children.

We want everyone to feel safe in Monmouthshire. Residents have voiced concerns about safety and rates of anti-social behaviour have increased slightly. We have worked with young people to address their concerns about knife crime and anti-social behaviour and have secured funding from the Police and Crime Commissioner's Office to support this work. We have worked with the Police and partners across the region to develop a strategy aimed at preventing the most serious types of violence across Gwent.

Community & Corporate Plan Objective: A Safe Place to Live

Objective: A Safe Place to Live		
Safe place 	Evaluation Score:	Level 4 – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We have drafted our ambition for development in the county and implemented projects and support to deliver our objective. Our assessment shows that the delay in progressing our plans has limited the impact we have made to deliver our objective in the short term.
Why we focussed on this?		
For most people, Monmouthshire is a really good place to live, but not for everyone. This needs to change. We will work with partners to create a safe place that people are proud to call home, increase the availability of good quality affordable housing, reduce homelessness and promote approaches to help homeowners to improve energy efficiency and reduce carbon emissions.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Increased supply of good quality affordable housing		
Having a safe, secure and warm place to call home is one of the most important contributors to peoples' well-being. High property prices and a limited supply of affordable housing mean this is currently out of reach for too many local people. We have granted 108 affordable homes planning permission this year, a significant increase on the 46 granted permission in 23/24. This is mainly attributed to improvements in river health permitting developments in Monmouth and Abergavenny that were previously restricted. An additional 71 affordable homes were delivered throughout this year, an increase on the 61 delivered in 23/24 and above our target of 60. We recognise that more affordable homes are need to meet need in the county and our deposit Replacement Local Development Plan aims to increase delivery. We have developed a deposit Replacement Local Development Plan (RLDP). This was endorsed by Council in October ahead of a public consultation in December 2024. This plan aims to address a number of key issues and align with the priorities of the organisation. It has allocated 50% affordable housing on each new development and is introducing enabling policies which will allow for further affordable housing developments to come forward. This includes facilitating more single person accommodation in the county which is currently extremely limited and is a factor contributing to homelessness. Council will consider the results of the consultation in Autumn 2025, following which the RLDP will be subject to public examination. We have engaged with owners of vacant properties, offering advice and support to help and encourage them to bring houses back into use. This has led to 36 applications to the Empty Homes Grant. Four owners have subsequently expressed an interest in leasing their property as temporary homeless accommodation.		Draft RLDP Applications for Empty Homes Grant Number of long-term empty homes

We have introduced more formal mechanisms to help tackle empty properties within the county. This includes a Council Tax Premium on long-term vacant properties to encourage owners to bring them back into use. Our approach has reduced the number of recorded long-term empty homes from 541 to 447.	
What we want to achieve: Reduce the number of people who become homeless	
We have seen increasing levels of homelessness in recent years, alongside this, limited temporary accommodation has meant we have been dependent on costly and unsuitable bed and breakfast accommodation to fulfil our responsibilities to citizens. We have applied a Rapid Rehousing approach and increased the resources for homeless prevention. This includes increased staffing, procedural changes and closer partnership working to support more people at risk and providing grants from the Homeless Prevention Fund to help tackle arrears/debt and enable households remain in their current accommodation or access alternatives. We remodelled our Housing Support service to include dedicated substance misuse support, temporary accommodation support and re-settlement support. This also includes dedicated support for young people with higher need through the expansion of the Housing First scheme with Pobl and the introduction of MoYo – dedicated housing floating support for young people. These initiatives have contributed to increasing the percentage of applicants successfully prevented from becoming homeless from 62% to 71%. We have identified further opportunity exists to review and refresh the current Housing Support Grant programme to increase effectiveness and we will focus on this over the next year. We are striving to provide more settled accommodation of homeless households in temporary accommodation. The number of households in temporary accommodation remains high, with 140 households in this accommodation. The focus of our RLDP on affordable housing provision will help us to address some of this need, particularly the demand for single person accommodation, of which there is a limited supply. We have also continued to engage with owners and private landlords to encourage them to make their properties available for temporary accommodation through private leasing. In order to meet more immediate demand, we have started to acquire accommodation for use as temporary accommodation. A former agricultural property has been refurbished, and approval has been given to repurpose Severn View, a former residential home, to temporary homeless accommodation with dedicated support. This will particularly help to reduce the need to use B&B accommodation. We have worked with housing associations to make more social housing available for homeless households; 55% of general needs social housing was allocated to homeless households in 24/25. We need to ensure that allocating further social housing to homeless applicants will not be detrimental to other housing need groups. The increased support for those at risk of homelessness, combined with efforts to increase availability of both temporary and settled accommodation, has contributed to a reduction in the use of bed and breakfast (B&B) accommodation from 46 people at March 2024 to 20 at March 2025. The number of 16- and 17-year-olds and the number of families in B&B accommodation was zero at March 2025. Ensuring increases in both temporary and permanent accommodation will be key to achieving our milestone of eliminating the use of B&B accommodation for households with children and young people.	Homelessness data Housing Support Grant programme Re-purposing of property

We regularly hold a Corporate Parenting Panel to coordinate and support care leavers to prevent them from becoming homeless. During the last year, eight care leavers experienced homelessness within 12 months of leaving care, an increase from five the previous year.	
What we want to achieve: A more energy efficient housing stock with a lower carbon footprint	
Tackling the climate emergency and reducing emissions is one of our priorities. Domestic properties are one of the biggest contributors to carbon emissions in Monmouthshire. The Replacement Local Development Plan (RLDP) has been subject to consultation ahead of consideration by Council in the Autumn. This will require new homes in the county to be net zero carbon. Once implemented, this will lower carbon emissions and help to reduce energy costs for residents in new homes. We have continued to support low-income households to access grant funding to improve the energy efficiency of their homes. We are promoting the Eco4 scheme which provides funding for low-income households and those living with medical conditions worsened by damp or cold to access energy efficiency improvements. During 24/25, 60 applications were processed, a significant increase on the previous year. We are working with the NHS to identify residents with respiratory or immune suppression illnesses who may benefit from the scheme. A targeted campaign is being prepared to increase take-up from those who can benefit from the scheme. We are supporting a range of further energy schemes such as Solar Together, a group-buying scheme for solar panels and Nest Scheme which provides advice and support for energy efficiency improvements.	Number of people supported to access Eco4
What we want to achieve: Communities in which everyone feels safe and respects each other	
Everyone should have the right to feel safe and have a sense of belonging in their local community. Our community safety team have worked with young people across the county to address concerns of knife crime and anti-social behaviour in the area. We secured £10k from the Police and Crime Commissioner's Office to support this work. We are also working with the charity Fearless to deliver workshops on critical issues such as county lines and knife crime at our youth centres, helping young people to navigate these challenges. Through our work we targeted 9 young people involved in ASB in Caldicot through a total of 121 sessions; this has resulted in a 23% decrease in ASB incidents in the towns where our teams are based, and 17% overall for the area. We are working to improve the relationship between young people and local police by regularly inviting police to our youth centres to engage with young people and understand what is important to them. We have continued to support young people through engagement at youth centres, providing a space to share concerns and any issues they are facing. Youth workers provide consistent emotional support, practical safety advice and made referrals to wider support organisations where necessary. We have worked with partners to develop a Gwent Serious Violence Prevention Strategy 2024/25. This has helped identify the serious violence priorities across Monmouthshire. We are now working with key partners and agencies to deliver a range of targeted interventions to address these.	Feedback from young people at youth centres Gwent Serious Violence Prevention Strategy VAWDASV strategy

We have contributed to the development of the Gwent regional violence against women and domestic sexual violence (VAWDASV) strategy. The strategy is now being implemented through partnership arrangements and will ensure that more people feel safe, and free from abuse and violence.	
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Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
	✓		✓	✓		✓



Well-being Objective: A Safe Place to Live

It is important the council **collaborates** with partners and **integrates** with their plans to reduce homelessness and ensure people can stay in their own homes and communities wherever possible. **Involving** and working with partners and community members is essential to develop communities in which everyone feels safe and respects each other. The Replacement Local Development Plan has a focus on **long term** and has affordable housing and a well-connected net zero carbon development at its heart. A focus on **preventing** problems occurring is essential to creating a safe place that people are proud to call home.

Measures of progress

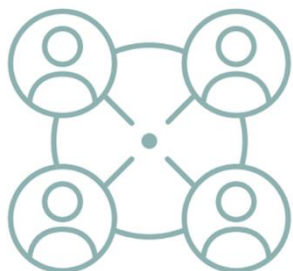
Milestone	Target for completion	Progress
Replacement Local Development Plan approved by Council	July 2025	Council will consider the results of the RLDP consultation in Autumn 2025, following which the RLDP will be subject to public examination.
The use of B&B accommodation is eliminated for households with children and young people	March 2027	There are currently 0 families in B&B accommodation, down from 9 at September 2024. Ensuring increases in both temporary and permanent accommodation will be key to achieving this milestone.
Rapid Rehousing Approach introduced	April 2023	This has now been completed. The Rapid Rehousing Approach was implemented in April 2023 and has contributed to increased focus on homeless prevention.

Measure	Previous	Latest	Target for 2024/25	Quick View	Comment
Number of affordable homes granted planning permission in year	46	108	50	↑	
Number of additional affordable homes delivered	61	71	60	↑	
Percentage of homeless applications who are successfully prevented from becoming homeless	62	71	70	↑	
Number of 16 and 17 year olds in bed and breakfast accommodation	0	0	0	↔	
Number of families in bed and breakfast accommodation	9	0	0	↑	Previous is September 2024, latest is March 2025.
Number of homeless households in bed and breakfast accommodation	46	20	40	↑	
Number of homeless households in temporary accommodation	161	140	150	↑	

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short

A Connected Place Where People Care



What we want to achieve:

- High quality social care which enables people to live their lives on their terms
- A healthy and active Monmouthshire where loneliness and isolation are reduced, well-being is promoted, and people are safeguarded
- A professional and passionate social care workforce

Strategic Assessment

We are changing the way we provide services to ensure that Monmouthshire is a place where people's contributions are valued, they feel part of a community and are connected to others. The council has a track record of delivering innovative approaches and rich partnership working in health and social care. Working in this way is vital to meet growing pressures on health and social care services. We have worked to speed up hospital discharge, helped vulnerable older people regain their independence, developed a longer-term strategy for domiciliary care, including reduce unmet care hours, and opened a new purpose-built specialist care home. These have increased the availability of care for those who need it now and set out our path for a longer-term strategy to meet increased demand for the future. We have also developed a recruitment and retention strategy to maintain the social care workforce we need.

Early help is vital to prevent children coming into local authority care. We have established a coordinated approach to early intervention in children's social services and overseen a gradual reduction in the number of children looked after. We are also delivering a new strategy to develop more in-county residential and supported accommodation placements. This will ensure that children can maintain local connections and much needed stability in their lives.

Healthy life expectancy in Monmouthshire is above both the average for Wales and the UK. This hides inequalities at a local level with a gap between those living in the most and least affluent parts of the county. We know that there are many factors that affect our health and well-being. For this reason, we committed to work with others across Gwent and the Institute of Health Equity to tackle these by becoming what is known as a Marmot Region. We are developing a strategy to enhance wellbeing, resilience and prevention for adult residents who are on the threshold of needing formal care and support. We have continued to deliver schemes to support people to be physically active and access nature for the well-being benefits it brings.

Community & Corporate Plan Objective: A Connected Place Where People Care

A Connected Place Where People Care		
Connected place 	Evaluation Score:	Level 4 – Good – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We have increased access to care and support in the county and provided services to support health and well-being of residents. Our evidence shows we are supporting higher levels and greater complexity of demand. Resourcing the preventive approaches required while meeting existing demand is a challenge to the delivery of our objective.
Why we focussed on this?		
Monmouthshire will be a place where people's contributions are valued, they feel part of a community and are connected to others. The health and social care system is facing significant challenges, and statutory services across the UK are struggling to cope with the volume and complexity of demand. Monmouthshire has a track record of delivering innovative approaches and rich partnership working. We recognise that well-being is about far more than treating people when they get sick. There are many factors that can affect our health including the environment, housing, what we do for work, how much we earn, our lifestyles, transport and community cohesion. These wider determinants of health, sometimes called the social determinants, can affect physical and mental health in either a positive or negative way.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: High quality social care which enables people to live their lives on their terms		
Early help is vital to prevent children coming into care. We have established a coordinated approach to early intervention and prevention in Children's Social Services. Demand for these services is high; we have maintained low waiting times by building capacity through group work and supporting student placements. This ensures that families get the help they need in a timely way and supports good outcomes for children. Evaluation and feedback of family support services indicates clear and positive outcomes for families. 100% of families continue to report a positive outcome following a Building Stronger Families team intervention. A significant amount of our prevention work is grant funded which could impact on our ability to deliver these services if the funding is altered or removed. We continue to review demand and work with partners to provide accessible and coordinated early help support. Early help services are the foundation for our long-term strategy to prevent and reduce the need for children to come into care. We are focussed on preventative family support throughout children's social care, from first referral to complex cases. We have seen an ongoing gradual reduction of children looked after from 209 in April 2022 to 190 in March 2025. Due to the demand and complexity of presenting issues there remains a shortage of suitable placements for children requiring support particularly locally, and especially those who need additional support or who are not able to be placed with foster carers. We have developed our foster care offer and a placement development strategy to address this. We have analysed demand and set a strategy to develop children's residential and 16+ supported accommodation placements within the county. This sets out how we will support the transition to not-for-profit care for children in Wales and respond to the associated risks and challenges. We have completed one project providing aged 16+ supported accommodation for five		Early help service evaluations Placement Development Strategy Children Social care performance data Hospital discharge monitoring information Reablement service performance information

placements and are developing a further three projects, two children’s residential homes and one further aged 16+ supported accommodation. This will improve availability or placements and help to ensure children and young people can remain close to their communities. The recruitment and retention of foster carers remains a significant challenge across Wales and the rest of the UK. We have an unfailing commitment to the recruitment and retention of in-house foster carers. Our fostering strategy has helped the us a achieve a small increase in fostering households and whilst our foster carer retention is generally good; we have an aging population of foster carers, and it is likely that some of our fostering households will retire in the next few years. Overall, the total number of Local Authority foster carers has not increased sufficiently to meet our needs. We still have a reliance on commissioning “for profit” foster placements for children from independent fostering agencies. As of March 2025, 35.8% of placements of children looked after were made with in-house foster carers. We have reviewed the foster care offer to Monmouthshire carers to support recruitment and agreed a case for investment in generic in-house foster carers. This includes increasing the fees paid to Monmouthshire (in-house) foster carers, this aims to support the recruitment and retention of foster carer to improve placement sufficiency. This will improve outcomes for children who are looked after and reduce costs. We are supporting an ageing population. This is the prime driver for increased demand in adults' social care. The proportion of residents aged 65 and over is expected to increase to 33.6% by 2043, compared to 25.7% across Wales. We have been implementing a renewed focus on assessment and review of care and support needs for adults requiring social care support to ensure residents receive the right support to meet their outcomes. This includes increasing the number of people accessing the opportunities that reablement provides, supporting people to relearn how to do daily activities and to reduce their need for further support, as opposed to providing long term care. Over time this should help to mitigate demand pressures. We have provided 309 packages of reablement in 2024/25, with 55.7% of these mitigating the need for further support. We are continuing to focus on the consistency in application of assessment and support provided at the front door of Adult’s social care to make sure people receive the most appropriate information, advice and assistance they need. We are increasing the use of assistive technology within care and support planning. The Assistive Tech service is supporting 1017 clients and provided 310 installations in 2024/25, this has provided a range of technology that helps support someone to live independently at home for longer. We want to ensure care is available for adults who require it. We have developed and are implementing a long-term strategy for commissioned domiciliary care. This supports place-based care and the provider market. At the same time this ensures that wherever possible our in-house provision is supported for reablement, utilising our expertise to support residents to retain independence. Due to a combination of our activities and external factors resulting in the demand and market for care at home stabilising across the region we have increased capacity across home care and significantly reduced the number of unmet care hours from 804 in March 2023 to 132 hours in March 2025, with 98.2% of hours of long-term domiciliary care now being fulfilled. This has improved access to care and support for those who need it. Our continued focus is on ensuring we have capacity and support available to review and assess care requirements to provide support that meets needs with the right services, allowing choice and consistency including the provision of reablement to try to reduce further needs. We have seen a gradual reduction over the year in the number of adults in receipt of home care, from 535 in April 2024 to 475 in March 2025, and an increase in the number of adults in receipt of residential care over the same period, from 319 in April 2024 to 357 in March 2025. The increasing need for residential care is a trend nationally, in Monmouthshire this increased demand is mainly due to an ageing population and increasingly complex	Care Inspectorate Wales Improvement Inspection of Adults services Adults Social care performance information Strategy for commissioned domiciliary care
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needs requiring increased support. Feedback from adults' social care services users shows continued high levels of satisfaction with their care and support; 84.7% of adults were happy in 2024/25, the same as the previous year. There remain challenges to responding to all people's care and support needs in as timely a manner as we would want due to continuing pressure across the social care and health system and the complexity of people's support needs has resulted in increased costs needing to be met from our Adults' Social Care budget. We are developing new provision and the way we provide care and support to meet this demand. We opened Severn View Park, a specialist care home for people living with dementia in March 2024. The home provides 32 bedrooms for both long-term support and short-term support in the form of respite based on a relationship-centred care model. The new care home aims to maintain connections with the surrounding community. We continue to work with partners in both primary and secondary health to prevent unnecessary admissions to hospital and support timely discharges. Ensuring well-coordinated and timely discharges and managing the pressure within the hospital system remains challenging. We convene weekly multi-disciplinary meetings to identify and unblock delays when they arise. The number of patients awaiting discharge varies during the year, in March 2025, 26 patients were awaiting discharge for social care reason. The main reasons for these delays include, waiting for assessment and capacity in care homes and domiciliary care. We continue to develop and embed our practice, working in an integrated way with acute and community settings and with multi-disciplinary teams to support hospital discharge. An Audit Wales report reviewing the arrangements to support effective flow out of hospital in the Gwent Region sets out several recommendations for both the health board and local authority to respond to and a collective response to address these has been developed. A Care Inspectorate Wales inspection improvement check of adult social services found key strengths in our establishment of a place-based approach and implementation of the commissioning strategy, the improved availability of domiciliary care development, reablement approaches reducing or mitigating the need for ongoing support. Areas requiring further development identified include the need for improvement in risk identification, staff engagement and communication and support for carers. We have developed a response to address the areas for improvement identified.	
What we want to achieve: A healthy and active Monmouthshire where loneliness and isolation are reduced, well-being is promoted, and people are safeguarded	
We recognise that well-being is about far more than treating people when they need support, there are many factors that can have an impact on our health including the environment, housing, what we do for work, how much we earn, our lifestyles, transport and community cohesion. These wider determinants of health, sometimes called the social determinants, can impact in either a positive or negative way on physical and mental health. We are committed to work with others across Gwent and the Institute of Health Equity to tackle these by becoming what is known as a Marmot Region. We are also developing a strategy focussed on enhancing wellbeing, resilience and prevention for adult residents who are on the threshold of needing formal (statutory) care and support. This will aim to coordinate our own council activity and work with partners to facilitate healthier lifestyles and build individual and community resilience so that residents, especially our more deprived residents, are enabled to live healthier and independently for longer – boosting their wellbeing as well as delaying or reducing their call on statutory services.	Youth Service provision Carers and Young Carers service Strategy for enhanced wellbeing, resilience and prevention

We are helping residents to live healthier and more fulfilled lives through improved access to outdoor opportunities. In total 41 schools, volunteers, local interest groups and partners have been involved in nature-based health and wellbeing projects and initiatives across the county, providing participants with increased access to nature to support well-being. We have supported young peoples' mental health and wellbeing across the county through the youth service Shift project. We have expanded the offer with a focussed grant funded programme called Emotional Logic. 90% of young people engaged in the project reported an improvement in their mental health/emotional well-being, exceeding the target of 85%. We have commissioned carers services, provided information and advice and offered a range of free events and activities to support carers and young carers' needs. We have focussed on re-shaping information we provide to carers, informed by feedback from the young carers and carers strategy group. This feedback is informing the redevelopment of our website, a revised carers handbook and improved signposting to other organisations with specific expertise and knowledge. We provide 1,028 adult carers on our database with advice and assistance through our biannual carer newsletter and discounted leisure offer. Similarly, 136 young carers are registered with the Young Carers Service and are provided with more targeted support. We are focussed on improving our engagement with our young carers on the support we provide. This feedback will also inform how we develop our assessments of carers needs. We undertake carers needs assessments to ensure that carers needs are understood in their own right. There is increasing demand for support, and carers awaiting a needs assessment has increased from 8 in 2023/24 to 23 in the same period in 2024/25, with a vacancy in the carers team reducing our capacity to undertake assessments. We are developing clearer information about a carer needs assessment to ensure all age unpaid carers are correctly supported by the appropriate agencies at the right time.	
What we want to achieve: A professional and passionate social care workforce	
We have developed our workforce planning arrangements. We have focussed our social care workforce development on addressing areas where there is high demand and recruiting to essential posts to meet the care needs of our residents. Recruitment is focussed on demonstrating the opportunities, career progression, work life balance and job satisfaction that people experience who work within the sector. Generally, the workforce in social care remains stable, the number of vacancies across social care was 26 in March 2025 compared to 23 vacancies in March 2024. The attraction and recruitment of people into the social care sector, particularly in some roles, continues to be a challenge. We have also undertaken a training needs analysis and used this to develop training plans focussing on professional development and practice. We have delivered a range of activities and support working with care providers and our partners. For example, we have developed a micro-care project to increase the availability of care in the county. The project supports self-employed carers to develop their businesses as well as providing the opportunity for greater oversight and governance of self-employed care workers operating within Monmouthshire. The number of micro-carers is steadily increasing. The number of carers has grown, with 59 carers registered (an increase from 24 previously). Micro-carers are delivering around 900 hours of care and support each week supporting Monmouthshire residents in their local community.	Social care workforce recruitment and retention data Micro-care project Fees for care providers

We have allocated additional funding to pay fees for care providers to increase the placements available for people who require care. We have provided an additional £2.7 million in last year's budget for care provider fees across Children's and Adults' social care. This ensures that providers can continue to pay the real living wage to attract and retain key staff to meet increasing demand. We need to ensure our fee rate remains a viable and attractive option for care providers. We have allocated an additional £3.2 million to cover an expected increase in fees following the review of care provider fees across Children's and Adults' social care as part of the yearly fee negotiations. This aims to ensure that residents can choose the best support for them.

Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
		✓	✓	✓		

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Well-being Objective: A Connected Place Where People Care



Adopting community-focussed approaches promotes **collaboration** which in turn will support well-being. By working with communities, we hope to **prevent** problems from occurring. Opportunities are plentiful in our county, so it is vital that everyone can be **involved** to maximise benefits to well-being. This should have a **long-term** benefit to individuals and communities. Our actions will have an **integrated** benefit for many aspects of promoting a healthier Wales. They will promote a Wales of cohesive communities and overall, help to create a more equal Wales. There is also strong integration with our responsibilities under the Social Services & Well-being Act.

Measures of progress

Milestone	Target for completion	Progress
Development of a young persons' Placement Development Strategy	April 2024	This has now been completed.
Approval of a commissioning strategy to support a sustainable domiciliary care sector	May 2024	This has now been completed.

Measure	Previous Period	Latest Period	Target for 2024/25	Quick View	Comment
The percentage of packages of reablement completed during the year that mitigated the need for support / positive outcome from reablement	55.3	55.7	60	↑	
Percentage of adult service users who are happy with the care and support they have had	84.6	84.7	90	↑	
Percentage of hours of long-term domiciliary care fulfilled	96.6	98.2	96	↑	
Percentage of families reporting a positive outcome following a building stronger families team intervention	100	100	90	↔	
Percentage of adult service users who have had the right information or advice when they needed it	77.6	78.0	80	↑	
Percentage of placements of children who are looked after by the local authority made with in-house foster carers	36.5	35.8	43	↓	As at Census date
Percentage of young people engaged in the youth service Swift project who perceive an improvement in their mental health / emotional well-being	84	90	85	↑	
Number of schools, volunteers, local interest groups and partners involved in nature-based health and wellbeing projects and initiatives across the county	New Measure	41	30		

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short

A Learning Place



What we want to achieve:

- Improved school attendance and reduced levels of exclusion which remove barriers to learning for vulnerable pupils
- The benefits of the new curriculum in Wales are maximised through excellent teaching and learning
- A truly inclusive educational system that recognises learners' starting points, strengths and educational needs
- Continue our programme of school modernisation

Strategic Assessment

We are working hard to ensure that Monmouthshire is a place where everybody experiences the best possible start in life and has the opportunity to learn, developing the skills and knowledge to reach their potential. The pandemic caused significant disruption to the education of our pupils. We are still seeing the consequences of this today. School attendance has declined since the pandemic. Our Education Welfare Officers have worked with vulnerable learners and we have a specific programme targeted at those with very low attendance levels.

We are seeing an increase in need for mental health and emotional well-being support for children and young people. There has been a rise in behaviours that challenge in our schools, with permanent exclusions becoming more common. This has required us to evolve and grow the learning and well-being support for our children and young people. We have restructured our education inclusion service and have worked with all schools with targeted training and support.

We provide monitoring and evaluation of teaching and learning. Learners in our secondary schools achieve higher results than elsewhere in Wales. Our disadvantaged learners attain in line with their modelled outcomes, although continue to experience lower attainment than those less disadvantaged. We have developed targeted support for these learners from education advisors and the wider community focussed schools approach. This is aimed at ensuring all pupils can succeed irrespective of their socio-economic background.

The environment children and young people learn in is important to their development and well-being. We have built a new 3-19 school in Abergavenny, and we have also developed plans and secured funding to increase our Welsh medium provision.

Community & Corporate Plan Objective: A Learning Place

A Learning Place		
Learning place 	Evaluation Score: Level: 4 – Good – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved We have developed our approaches and increased our support to schools and pupils to achieve our objective. Our evidence shows the demand and complexity of support children and young people require, particularly vulnerable learner, has grown. Our assessment identifies the need to further adjust, develop and target our support to achieve our objective.	
Why we focussed on this? Monmouthshire will be a place where everybody experiences the best possible start in life and has the opportunity to learn, developing the skills and knowledge they will need to reach their potential. The pandemic has had a substantial effect on schools and pupils. The two years of uncertainty and significant disruption to learning have inevitably left a legacy. Before the pandemic we knew that our disadvantaged learners did not achieve the outcomes we would wish. The pandemic has worsened the learning experiences of many vulnerable students such as those eligible for free school meals. The emotional and mental well-being of pupils was often affected, with many experiencing increased uncertainty, anxiety and loneliness. In line with our guiding principles, it is vital that we develop more opportunities to listen and learn from our pupils and students. Since schools have reopened the education system in Wales has continued to evolve with reforms and developments including the new curriculum for Wales and the introduction of a new Additional Learning Needs Act.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Improved school attendance and reduced levels of exclusion which remove barriers to learning for vulnerable pupils		
We recognise that being around teachers and friends in school is the best way for pupils to learn and reach their potential. Being in school can also support pupils' wellbeing, and wider development. We continue to work with our schools to support pupils to attend. Lower attendance levels in our schools remains a challenge since the pandemic and continues to be a national issue. We have dedicated education welfare officers who are working with vulnerable pupils to bring them back into the educational setting, where possible, and are holding attendance consultations with schools regularly to promote attendance and provide bespoke support to families. We have updated our attendance policies to strengthen systems and processes to improve and sustain high levels of attendance in line with new Welsh Government guidance. As a result, overall attendance has increased during the academic year 2024/25. There has been a gradual increase in attendance in our primary schools, at the end of the academic year 2023/24 attendance was 93.6%; provisional data shows attendance was 94.1% in the summer term 2024/25. Attendance in secondary schools remains lower and has been slower to increase, attendance was 88.2% in the academic year 2023/24, provisional attendance was 90.1% by in summer term 2024/25. Attendance for those eligible for free school meals (eFSM) remains lower and we continue our work to improve attendance for these pupils to return the school environment to support their well-being and educational attainment. Pupils eFSM attendance in primary schools was slightly lower in the academic year 2023/24 at 89.0%, and significantly lower in secondary schools at 75.8%; provisional data shows attendance was 89.3% in primary school and		Education Welfare Service School Attendance School Exclusions Whole school approach to emotional and mental well-being Trauma Informed Schools Training

79.8% in secondary school in the summer term 2024/25. This means we will need continue to focus on our work to securing improvements in attendance for these pupils to ensure no pupil is left behind and all can achieve their potential.

There has been an increase in episodes of behaviours that challenge in schools as a result of the continuation of trends that first emerged during the pandemic. This is a national challenge and is an issue that poses a challenge for schools, staff, and learners. There is a risk that this will also result in a worsening of educational attainment. We have continued to develop and evolve our support to reduce and prevent behaviour that challenges. We continue to try to further understand the reasons for this behaviour and implement support for learners' wellbeing. We have implemented the whole school approach to emotional and mental well-being. This helps schools to understand how they are best placed to promote well-being. We have introduced this in a phased approach and increased the number of schools engaged in the approach from 74% to 88.2%. All schools and settings are engaged with Emotional Literacy Support Assistants (ELSAs), and we currently have 78 practicing ELSAs, at least one in each of our schools, who access regular supervision making a positive impact on the emotional literacy of pupils.

We continue to be committed to our trauma informed practice which form part of a universal, whole-school, preventative approach, which continues to be led by the Educational Psychology Service (EPS). We have developed a Monmouthshire specific Trauma-Informed Professional Learning programme in collaboration with Traumatic Stress Wales (TSW) and Adverse Childhood Experiences (ACEs) Hub Wales. This aligns with the Trauma-Informed Wales Framework. This approach focuses on understanding children/young people presenting with behaviours of concern and raising the awareness and capacity of adults supporting vulnerable pupils. Currently 79% of schools (27 of 34) are engaged in professional learning related to Emotionally Based School Avoidance (EBSA); Trauma Informed Approaches; and Autism.

The continued work of the Vulnerable Learner Lead and increased capacity within the Inclusion Service is supporting more focus on managing exclusions, this includes an increased focus on the role of critical friend to schools where the use of exclusion is of concern. The number of permanent exclusions from schools was high at 22 in the last academic year. This year to date 20 permanent exclusions have been issued but none of these have been upheld at Pupil Discipline Committees (PDC). This is due to the improved operation and effectiveness of the Inclusion Panel to consider acceptable alternatives to permanent exclusion where the threshold is met. This has enabled the Inclusion Service to work with schools and other agencies, to offer viable and suitably risk-managed alternatives. The number of fixed term exclusions also increased in the last academic year and remain high. The high levels of exclusions have increased the pressure on the Pupil Referral Service (PRS) to support pupils who have been excluded, and those at risk of exclusion. Our investment in new accommodation and enhanced leadership is improving capacity to support pupils in the PRS.

What we want to achieve: The benefits of the new curriculum in Wales are maximised through excellent teaching and learning

We need to support all learners to secure the necessary skills and knowledge that we would expect them to have at the relevant point in their education. Schools in Monmouthshire are embracing the new curriculum. Through our regular monitoring and Estyn inspections, we know that overall, many schools are making good progress in developing a broad, balanced and purposeful curriculum that reflects the context of the school and meets pupils' needs well. Nearly all schools have aligned their curriculum with the principles of the Curriculum for Wales and most have a clear vision for the curriculum. They have carefully designed their curriculum to promote pupils' moral, social and cultural development effectively. Teachers plan worthwhile learning experiences that support all pupils to develop and transfer their knowledge and skills to other areas of the curriculum. Where this is most successful, teachers provide a range of engaging, exciting and inclusive learning experiences that meet the pupils'

Estyn Inspection reports

Attainment data

School Development Plans (SDPs)

interests and develop pupils’ knowledge, skills and experience progressively. Schools continue to refine and adapt their curriculum to reflect pupil’s interests and the changing context of the school. Between April 2024 and the end of March 2025, Estyn inspected six primary schools and two secondary schools.

Our focus remains on supporting excellent teaching and learning. We have worked with the Education Achievement Service to provide challenge, monitoring and evaluation of teaching and learning in schools. All schools are provided with a bespoke support package that complements the priorities identified within their own School Development Plans (SDPs), in line with the levels of support they require.

The results of learners in our secondary schools are higher than elsewhere in Wales. On average, the capped 9 points score was 369.8 in Monmouthshire in 2024, compared to 358.1 across Wales. Most of our pupils performed in line with their expectations; overall, two schools in Monmouthshire were above Welsh Government modelled capped 9 outcomes, and two below. Breaking groups of learners in each individual school into ‘thirds’ compared with modelled outcome shows that all schools are above expectation for the highest and middle achieving thirds. In the lowest third two schools are well above expectation, but two are below, one significantly (the equivalent of half a GCSE grade per learner, per subject). This suggests a need for targeted intervention to support lower-attaining learners. Overall, 27.5% of pupils across Monmouthshire are achieving 5 or more GCSE at levels A*-A in 2024, compared with 18.1% for Wales. We also have fewer pupils leaving school with no qualifications, at 1.1%, although higher than 0.8% in 2024, compared with 1.8% of pupils across Wales. Adjustments in examinations means direct comparison with the previous year's outcomes has not been provided.

When schools evaluate their own performance, they assess this against similar schools. This is a more informative and detailed assessment of attainment and wider progress, given the varying make up and individual plans of schools, than comparing against Wales averages. When comparing our comprehensive schools with those of similar size and linguistic delivery across Wales, two schools outperform schools in almost every category (including capped 9, literacy, numeracy, science, Welsh Baccalaureate, 5+ A*-A, expect one school for no qualifications). One of our schools underperforms in some categories and one in more categories compared to similar schools. We continue to support our schools to raise attainment levels beyond expected levels to levels where they and we want attainment to be.

We have an agreed Welsh in Education Strategic Plan that sets our strategic direction for the planning, delivery, and growth of Welsh medium education in Monmouthshire over the next ten years. We are mainly on target with delivering the plan, in line with point we want to be in the plan. We are working with childcare providers to expand the availability of Welsh medium childcare provision. The development of an additional Cylch Meithrin has not progressed as planned which has limited access to childcare, through the medium of Welsh. We opened a new Welsh-medium primary school to serve both Monmouth and the surrounding towns and villages, Ysgol Gymraeg Trefynwy, in September 2024, uptake of places at schools has been positive and from September the school will welcome pupils from nursery age to Year 3 pupils. We have established an immersion class at Ysgol Y Ffin and have secured funding to establish a second class in Y Fenni to enable pupils from year 3 and upwards to transfer into Welsh-medium education, and in doing so support an increased demand when the school moves to a new site in September 2025. The current number of Reception learners in Welsh medium schools is 57, which is 64% of our 2031 target.

Arrangements to develop and track linguistic progression within Monmouthshire schools and at transition from Year 6 to Year 7 has strengthened significantly during the year through bespoke support from the EAS. The number of children transitioning from a Welsh language primary school

into a Welsh language secondary school in the summer of 2024 was 22 and below our expectation. We will continue to implement our plan to increase Welsh medium education in the county.	
What we want to achieve: A truly inclusive educational system that recognises learners' starting points, strengths and educational needs	
Over the past three years, schools have seen a consistent increase in the number of learners eligible for free school meals (eFSM), ranging between 5% to 48% (with an average of 18%). We need to support learners who are eligible for Free School Meals (eFSM) or who are experiencing the impact of poverty, and those learners with Additional Learning Needs (ALN) throughout our provision. We have worked with the Education Achievement Service (EAS) to provide challenge, monitoring and evaluation of teaching and learning in schools. This has a particular focus on vulnerable learners, which includes those eligible for free school meals who are also more likely to have further needs requiring support. eFSM learners in Monmouthshire attain higher than their peers in Wales at Key stage 4, the capped 9 points score for Monmouthshire pupils eFSM was 304.7 for exams in the summer of 2024. Modelled expectations for eFSM learners are all above expectations for all indicators (including capped 9, Skills Challenge Certificate, numeracy and science), except the literacy indicator which is slightly below. There remains a difference in attainment between those pupils eligible for free school meals and those not by around 1.3 GCSE grades. Lower attendance levels for eFSM learners will also have an impact on their attainment. Schools continue to undertake a detailed assessment of attainment and wider progress based on the varying make up and individual plans of each school to ensure that each pupil has an equal opportunity to succeed no matter their socio-economic background. We have developed a new Inclusion Strategy and an updated Additional Learning Needs (ALN) Policy to shape our work with children and young people in schools and settings in Monmouthshire. The Inclusion Strategy sets out our priorities to improve outcomes for children and young people in vulnerable groups and their families. The Additional Learning Needs Policy outlines our approach to supporting children and young people with barriers to learning and additional learning needs, ensuring they receive the necessary support, resources, and opportunities to thrive academically, socially, and emotionally. Our Inclusion support is now embedded as part of interconnected strategies and related toolkits, resources and policies. This covers ALN, relationships, children looked after and reducing exclusions. A framework is being developed for the management of specialist resource bases (SRB) to ensure a consistent, equitable approach across all settings. We have established an Additional Learning Provision (ALP) Review and associated quality assurance cycle to ensure that there is a consistent and equitable approach to meeting the needs of Monmouthshire children and young people with ALN. The assessment demonstrates many strengths in provision across Monmouthshire, as well as identifying some recommendations for development on the consistency of ALN provision across the county. We are operating the Inspire programme in each secondary school in Monmouthshire to work with vulnerable learners, with a designated worker per school. Inspire has supported 340 young people since January 2023, to achieve 185 life skills and 130 qualifications, providing them with further learning to improve their future life chances. The inspire project is funded by the Shared Prosperity Funded (SPF). We have secured funding for the project for another year, as part of transitional funding, while announcements are awaited regarding the future of the funding for subsequent years. Our Community Focussed Schools lead works with schools and partners to develop activities and relationships for the benefit of the whole	Attainment data School Development Plans (SDPs) Community Focussed Schools Inclusion Strategy Additional Learning Need (ALN) Strategy Additional Learning Provision (ALP) Review Inspire programme Adult education courses participation Additional Learning Needs (ALN) Strategy

school community. This has included building relationships, signposting to support and benefits entitlements, poverty proofing schools and providing cost of living support. We are reducing financial barriers to our adult education courses to make them more accessible to our residents. We have reviewed our course funding model and have shifted to a grant subsidised model; this now means that all our community education courses are directly subsidised. We have also continued our partnership with Coleg Gwent to offer low-cost foundation-level learning, costing £10 for access to all franchise courses provided in Monmouthshire. We recognise the importance of removing any barriers to involvement in adult education and the effect it can have on adults gaining new skills and knowledge. In 24/25, 909 learners enrolled in our community education courses, above our target of 876.	
What we want to achieve: Continue our programme of school modernisation	
The environment in which children and young people learn is important to their development and well-being. We have completed the construction of the new King Henry VIII all-through school in Abergavenny in April 2025. The facility provides a hub for learning in Abergavenny, providing the tools for young people to thrive as well as well wider community facilities. The building is the first operationally net zero carbon all-through school in Wales, in line with our commitment to decarbonise our operations. The school has the capacity for 1,200 secondary school age pupils, 420 primary age pupils and 200 places for post 16 education. There will also be suitable accommodation for 71 pupils with complex neurodevelopmental and learning needs within the school. It is anticipated that the development will reduce the number of pupils attending an out of county secondary school. The remaining construction of the site's playing fields and energy centre is scheduled to be completed by April 2026. Full Council approved a capital investment of £1.2m to improve and remodel the accommodation to facilitate the relocation of the south Monmouthshire pupil referral service. This is providing the service with a permanent and dedicated high-quality environment that is conducive to the needs and increasing demands of the vulnerable population of pupils it serves. We are expanding our provision of Welsh medium education. We have secured a new site for Ysgol Y Fenni which will increase the capacity of the school from 210 to 420 pupils. Work is scheduled to be completed in September 2025. We opened Ysgol Gymraeg Trefynwy on the site of Overmonnow Primary school in September 2024, with 24 pupils attending. To continue the expansion of our Welsh medium provision we need to focus on promoting Welsh medium education and securing appropriate staff to ensure a high-quality education for our young people.	King Henry VIII all-through school Welsh in Education Strategic Plan Pupil Referral Service

Well-being of Future Generations Act impact						
Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
✓		✓	✓		✓	

Well-being Objective: A Learning Place



The **long-term** nature of this goal is intrinsic to its success. Working with and **involving** children and young people, as early as possible, to identify their needs will give them the best chance of achieving their maximum potential. **Preventing** problems before they start will provide our young people with the best chance to develop. Using a **collaborative** approach and aligning services provides a rounded resource that works in harmony for the young person. Overall, this approach **integrates** the needs of our young people, ensuring they have the best opportunity to achieve their goals.

Measures of progress

Milestone	Target for completion	Progress
Attendance and Engagement Strategy updated to strengthen systems and processes to improve and sustain high levels of attendance in line with new Welsh Government Guidance	September 2024	A range of policies have been updated to support increased attendance levels. These include the council attendance policy, primary and secondary school attendance model policies and fixed penalty notice policy.
Inclusion Strategy approved by Cabinet	November 2024	The Inclusion Strategy and ALN Policy have been drafted and consulted on between October – December 2024. The draft policy was scrutinised by People Scrutiny Committee in February 2025.
Quality Assurance of Additional Learning Provision across the county via school's finance forms and provision pyramids is completed. Additional Learning Provision (ALP) meets the needs of vulnerable learners in the county and is of good quality	Regular Assessment	Additional Learning Provision (ALP) Review associated quality assurance cycle has been established. An update on the outcomes and recommendations from the quality assurance was presented to Performance & Overview Scrutiny Committee in June 2025.
Additional Learning Need Coordinators and Specialist Resource Base Leads are engaged in quality assurance processes around the consistency and impact of Additional Learning Need provision through Additional Learning Provision forum and cluster / Specialist Provision and Outreach Team	Regular Assessment	Individual Development Plans moderation has taken place at both a cluster and Local Authority level. Secondary supported self-evaluation for ALN / ALP outcomes have been shared with ALN coordinators and Headteachers; where relevant action plans have been developed with schools or existing plans added to.
A new carbon neutral, 3-19 school is opened in Abergavenny	Phase 1 April 2025, Phase 2 April 2026	Phase 1 was completed in April 2025 with completion of the new school building.
A strategic review of school catchments is completed, and recommendations are made to Cabinet	Annual review of policy	The School Admissions Policy 2025/26, including a review of school catchment areas, was approved by Cabinet in April 2024, in which it was agreed to accommodate the villages of Tredunnock, Llanhennock and

		Llandegveth into the catchment area for Usk Church in Wales Primary School. The changes will be implemented for the academic year 2025/26.
Deliver a new non-maintained nursery in Trellech, invest S106 funding to improve the infrastructure at Castle Park and Archbishop Rowan Williams schools and improve and develop the buildings used to accommodate the Pupil Referral Service	Trellech March 2025, Archbishop Rowan Williams January 2027	Trellech Nursery building was completed and opened in February 2025. We are investing S106 funding to improve the infrastructure at Castle Park and Archbishop Rowan Williams schools and expect to complete this by January 2027
A new Welsh-medium seedling provision is opened in Monmouth	September 2025	We opened Ysgol Gymraeg Trefynwy on the site of Overmonnow Primary school in September 2024
A newly refurbished Welsh-medium primary school is opened	Opened and refurbished September 2025	We have secured a new site for Ysgol Y Fenni which will increase the capacity of the school from 210 to 420 pupils. Work is scheduled to be completed in September 2025

Measure	Previous	Latest	Target for 2024/25	Quick View	Comment
Percentage pupil attendance (brackets show eFSM figures) i) Primary ii) Secondary	i) 92.9 (89.0) ii) 88.1 (77.2)	i) 93.6 (89.0) ii) 88.2 (75.8)	i) 94.6 (92.6) ii) 91.2 (82.4)	↑	Data measured in academic years. Previous is 2022/23 academic year data. Latest is 2023/24 academic year.
Percentage of schools engaged in professional learning related to Emotionally Based School Avoidance (EBSA); Trauma Informed Approaches; and Autism	New Measure	79%	100%		New Measure for 2024/25
Number of Reception learners in Welsh medium schools	48	57	85	↑	Longer term target is 105 by 2030.
Number of children transitioning from a Welsh language primary school to a Welsh language secondary school	27	22	46	↓	Latest is summer 2024, transition numbers varied in primary schools. As a result, transition numbers are lower than the target this year.
Number of young people supported by Inspire (in school support/outreach support/post 16 support) to achieve an additional qualification and / or achieve a life skill	New Measure	186	133		New Measure for 2024/25
Total number of enrolments by adult learners on community education courses including Coleg Gwent franchise courses	937	909	876	↓	

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short

Using Our Resources

The council needs to remain relevant and viable for the next generation, while continuing to meet the needs of residents, visitors and businesses in the here-and-now. To support the delivery of our goals, we must make sure that all aspects of the council are working efficiently, effectively and in line with the sustainable development principle set out in the Well-being of Future Generations Act.

The Act specifies core areas in an organisation that need to adapt to meet the changing demands on our services and ensure their longevity and sustainability. We have evaluated our arrangements for these areas and included digital and data as another important enabler of how we deliver the council's services. The areas we have assessed are:

- Corporate planning, performance and risk management
- Financial planning
- Workforce planning (people)
- Procurement
- Assets
- Digital & Data
- Democracy & Scrutiny

Annual Governance Statement

The council has a governance framework, our Code of Corporate Governance, for the year end March 2025. The framework comprises the systems and processes, and culture and values, by which the Authority is directed and controlled and its activities through which it accounts to, engages with and leads the community. It enables the Authority to monitor the achievement of its strategic objectives and to consider whether those objectives have led to the delivery of appropriate, cost-effective services.

We have produced a draft Annual Governance Statement for the year 2024/25 that demonstrates that we have appropriate governance arrangements in place to meet the governance principles and that a review has been undertaken to assess the effectiveness of those arrangements. This self-assessment of our resources integrates with the findings from the Annual Governance Statement and will also contain further actions and recommendations related to these arrangements.

Corporate Planning, Performance and Risk Management – Evaluation Score: Level 4 - Good

How effective is corporate planning?	How do we know?
We have developed and agreed a Community and Corporate Plan 2022-28. This sets a clear direction for the council. An Audit Wales review of our objective setting in the Community and Corporate Plan has found ‘the council has set its well-being objectives in accordance with the sustainable development principle and is aligning its key strategies and business plans to support their delivery, but it could further strengthen its approach by increasing the diversity of citizen involvement in future’. We have developed an accompanying performance measurement framework. We have reviewed the measurement framework to increase the focus on outcomes, where possible. We have set targets against these measures that demonstrate the ambition of the council to residents. This is allowing us to be held to account for performance and measure our performance on areas that can be directly affected by the council and the progress of wider outcomes that are not directly in the council’s control. This also responds to the Audit Wales review on the council’s use of performance information which found ‘the council provides some performance information to enable senior leaders to understand the perspective of service users, but information on outcomes is limited. Supporting and enabling strategies have been developed to ensure they are fit for purpose and support the new policy aims and objectives set out in the Community and Corporate Plan. These will enable the delivery of the ambitions of the plan. We have developed arrangements to monitor the impact of these strategies and regularly evaluate performance against outcomes, through an annual performance assessment.	Community and Corporate Plan 2022-28 and measurement framework Audit Wales reports Enabling strategies Annual performance assessment of enabling strategies
How effective is performance management?	How do we know?
The approval of the Community and Corporate Plan has ensured that there is a clear direction for the council. This has been embedded in our performance management framework. Regular reporting ensures accountability at all levels and demonstrates progress to residents. We have embedded the self-assessment process in the council’s performance management framework. The self-assessment process has facilitated the completion of a robust evaluation of performance. These performance management arrangements have helped to clearly identify areas of progress and areas for development. An Audit Wales review of our performance management arrangements found ‘the council has a maturing performance management system that supports delivery of its corporate objectives’. Service business planning principles, supporting templates and guidance are in place and regularly reviewed. Service business plans are facilitating services to plan for the next three years, assess what went well, learn from what did not and measure the impact their service has made on people and places of Monmouthshire. Service business plan completion rates and quality have improved. Although these remains varied and require improvement. Latest monitoring shows 60% were updated within timescales and there is an increase in compliance with principles. Quality assurance on service business plans has shown areas of planning still require development to ensure the principles are consistently applied.	Community and Corporate Plan progress report Draft Self-assessment report Service business plans & quality assurance

How effective is risk management?	How do we know?
We have developed an updated strategic risk management policy and guidance. This defines the approach, process and responsibility for managing strategic risk in the council. This also defines risk tolerance and a risk appetite for the council. The policy is being embedded in the council, the requirements have been integrated as part of the council's performance management framework. There remains some part of the new policy that need to be embed through the organisation. The strategic risk register is updated regularly and available to all members and officers to view at any time. There are arrangements to formally review the whole strategic risk register and report it six monthly to scrutiny, Governance and Audit Committee and Cabinet. This facilitates and demonstrates that risk management is embedded in the council and strategic risks facing the council are being robustly identified and managed. The risk assessment in service business plans is not always completed robustly. This limits the ability of services to use their service business plans to robustly manage and mitigate risks and may impact the escalation of risks onto the strategic risk register.	Strategic risk management policy, appetite statement and guidance Strategic risk register

Financial Planning – Evaluation Score: Level 4 - Good

How effective is financial monitoring?	How do we know?
We have closely monitored our finances at regular intervals throughout the year. Cabinet have received regular financial updates. These have forecasted a revenue budget deficit for the financial year 2024/25 for which we implemented budget recovery action. This has included services bearing down on avoidable cost and identifying further income opportunities wherever possible in order to bring the budget back to a balanced position. As a result of this action, forecasts through the financial year have demonstrated an improvement in the forecast financial position at the end of the year. Our 2025/26 budget setting process also identifies many risks that remain to be assessed and managed within the year. These include high demand for council services; deliverability of budget saving proposals; pay awards; and employer's national insurance contributions. Grant funding also supports delivery of some our priorities, particularly preventive approaches, there is associated risks to the certainty of some funding, which can limit our ability to plan longer term. We have strengthened our governance arrangements and will continue to implement these through 2025/26 to provide assurance that robust arrangements are in place to respond to any circumstances where further budget pressures might require additional mitigation or savings to be brought forward. There remains variability in the quality of our budget monitoring and forecasting across service areas. This has impacted on the effectiveness of our in-year budget management. We are developing a structured financial training programme for staff on our learning management platform to help strengthen financial monitoring. Prioritisation of budget monitoring and year end accounts closure has resulted in a slight delay from the original schedule.	Financial monitoring reports
How effective is financial planning?	How do we know?

We established a clear process and timetable to set a budget for the 2025/26 financial year. We developed a range of proposals in line with a set of budget principles. The proposals were subject to public engagement, robust scrutiny and an assessment of their potential impact. This informed the development of the final budget proposals. This planning resulted in us setting a balanced budget for the 2025/26 financial year.

Our capital planning is based on an established prioritisation process informed by evidence and assessment of risk to develop a programme within the financial constraints on the council. We have reviewed and agreed a current and forward capital programme for 2025/26. The core capital programme is being sustained and sets planned investment in the council's infrastructure. There remains a considerable number of backlog pressures that sit outside the core capital programme. These have varying levels of risk associated with them.

Our financial planning arrangements identify current and future budget pressures which pose a risk to the deliverability of our objectives in the Community and Corporate Plan. We have developed a Medium-Term Financial Strategy (MTFS). This strategy provides the strategic framework for the Medium-Term Financial Plan (MTFP), and a set of key principles to guide medium term financial planning. These enable us to plan for the council's long-term policy objectives within our financial capacity. As part of the development of the strategy, a delivery plan has been established, which is monitored and scrutinised regularly. The authority's budget modelling assumptions are reviewed and updated regularly. We are developing a wider programme of service change that will include an ongoing assessment of key service pressures, the risks and modelling assumptions that sit alongside it. This is essential to establish a clear plan and approach to address the medium-term budget shortfalls forecast.

Budget setting reports
2025/26

Medium -Term Financial
Strategy

Further areas for development identified through our 2024/25 self-assessment

A programme of service change which identifies sustainable ways to deliver services whilst addressing the forecast funding gap.

Workforce Planning – Evaluation Score: Level 4 - Good

How effective is workforce management?	How do we know?
We have a loyal, dedicated and talented workforce that continue to deliver our services and objectives for residents.	People Strategy
We have an established set of policies and procedures that guide our Human Resources function. These support standards and behaviours we expect employees to deliver. They also allow flexibility and opportunity for our workforce to develop their careers in Monmouthshire. If employees do not meet these standards, we have arrangements to manage and resolve these issues.	Workforce management data
We have increased engagement with our workforce, including relaunching the People Leaders Workshops and team Q&A sessions, which are held face-to-face in peoples' workplaces, and holding two face-to-face staff conferences. We also ran a staff survey to enable us to understand how connected people feel to the organisation. The results have been fed back to staff and will be used to inform the development of our workforce planning and management arrangements.	Staff survey

Our sickness figures have increased slightly from 11.9 to 12.7 days per full time equivalent employee, we continue to analyse the figures to support service areas in managing and supporting colleagues. We have a developed well-being offer, including the 'Go To' group, free counselling and a well-regarded occupational health service. The results of our staff survey shown that only around six out of ten employees think we do enough in this area. In response, we created a marketplace at the staff conference to promote our offer. We also need to ensure our workforce management support is targeted and applied consistently to support our colleagues.

We have developed a new employee appraisal scheme aligned to a training needs analysis. This has been piloted in some service areas. We have yet to roll this out across the organisation due to capacity constraint. This scheme aims to improve our ability to link individuals' performance to the priorities of the organisation and improve accountability. It will also ensure we understand peoples' development needs and can design our training offer to fit this.

How effective is workforce planning?

We have a flexible approach to workforce planning to attract and retain people to roles in the council. This includes long-standing agile working arrangements, for jobs that do not require employees to travel to their base every day and targeted recruitment campaign for certain jobs.

We are in the early stages of developing our workforce planning arrangements. We have become a member of workforce planning networks, to learn from others in the development of our practice. We do not yet have all the arrangements in place to facilitate the organisation to plan the workforce it needs to meet current and future demands. We have seen a reduction in turnover this year. The continued delivery of our new People Strategy will aim to improve the effectiveness of our workforce planning.

We are experiencing recruitment challenges in specific sectors, most of which match wider national recruitment issues. We have implemented an e-recruitment system to support the development of recruitment as a genuine talent acquisition process. Some challenges in use have been experienced by recruiting managers and we will be seeking feedback to inform how we embed the system.

The development and retention of existing staff is an essential component of workforce planning. A learning management system (Thinqi) has now been rolled out to all staff; this provides a centralised training and development area for officers and includes a host of learning resources for staff as well as the opportunity to book face to face and digital/online training. We need to develop our training offer to equip the workforce with the skills its needs for now and the future.

How do we know?

People Strategy

Workforce management data

learning management system

Procurement – Evaluation Score: Level 3 - Adequate

How effective is strategic procurement?	How do we know?
We have developed and Cabinet has approved, a Socially Responsible Procurement Strategy 2023-28 which sets an enabling platform for the development of progressive policies that will achieve greater and more targeted social, economic, environmental and cultural gains through working with our supply chains.	Socially Responsible Procurement Strategy 2023-27
We have begun to develop supporting policies and guidance to enable the delivery of this strategy, including giving consideration to new legislative requirements of the Procurement Act. We have held workshops and training sessions, as well as developed training videos, to support staff to implement the requirements of the strategy. We are also developing training modules to be made available on our learning management system. We are monitoring completion rates of training and promoting completion of training and use of guidance. We need to ensure officers feel supported and are provided with the knowledge and skills needed to deploy the necessary thinking and processes to secure value for money in procurement and deliver the aims of the strategy.	Draft Socially Responsible Procurement Policy Updates CPRs
We are developing a Socially Responsible Procurement Policy, in collaboration with Ardal, to implement our ambitions in the strategy. We need to accelerate its completion to provide clear guidance to officers and our supply chains. The policy will provide a well-being framework to ensure a consistent approach to the delivery of 'Socially Responsible Procurement' that encapsulates UK and Welsh Government legislative requirements and the council's priorities.	Revised Contract Forward Plan Updated guidance and training
We have developed updated Contract Procedure Rules (CPRs) that reflect the new legislative requirements of the Procurement Act and worked with Ardal to standardise the core elements of the CPRs across all Ardal Councils. Digital governance forms including Pre-Tender and Contract Award Reports have also been developed and rolled out across all Ardal Councils for all tenders in excess of £75,000 to promote transparency. This ensures that all tenders are challenged and that consideration for Community Well-being Benefits (CWBs), Social Value, safeguarding, fair work, carbon reduction and localism are, where appropriate, delivered as part of the award of contract.	
We are developing a new and revised Contract Forward Plan to mirror the requirements of the Procurement Act and the requirement to publish a Pipeline Notice of all current and future public contract opportunities over £2M. The development of more definitive Contract Forward Plans allows greater dedicated time for procurement professionals to consult with operational technical leads to discuss options and undertake soft market testing if there is an opportunity for innovation. This will also be used to assess opportunities to create better economies of scale and identify contracts where Community well-being benefits can be delivered.	
We are continuing to work with suppliers to ensure they are able to meet the requirements of the strategy and developing policy. This included developing Carbon Reduction Plan Guidance and holding a Carbon Reduction Workshop Programme, targeted at three high carbon spend areas. As part of the response to the new Procurement Act, we have simplified the quotation processes for low value opportunities and introduced a digital form for service areas to record their quotation process and outcomes. We will continue to look to reduce the burden of information required from bidders ensuring that it is proportionate to the value of the procurement.	

We are reviewing how to increase opportunities for local businesses to bid for work. We are aiming to work with partners to publicise opportunities on the Contract Forward Plan to local businesses that have not worked with the council previously. We have worked with the other Ardal Councils to develop an Ardal Selling to the Council Guide that will be launched in July 2025. The Guide is designed to help suppliers and contractors understand how to do business with all Ardal Councils.

Further areas for development identified through our 2024/25 self-assessment

Strengthen arrangements that support officers undertaking procurement to meet the ambitions of the Socially Responsible Procurement Strategy

Assets – Evaluation Score: Level 5 - Very Good

How effective is strategic Asset Management?	How do we know?
We have developed an Asset Management Strategy 2023-2027 that informs the way decisions and day-to-day management of council land and property is undertaken. It sets five clear objectives for land and property to deliver the council's objectives. It also establishes the supporting policy framework from which the strategy is implemented. The Asset Management Strategy is supported by an Asset Management Plan which identifies the actions to deliver the strategy. We have continued to develop significant building projects in the last year, improving services to residents and supporting community activity in line with wider corporate strategies. In March 2024 we opened Severn View Park, a specialist care home for people living with dementia. The care home provides a bespoke environmental design, based upon innovating best practice standards for people with dementia and a relationship-centred care model. In Education, new provisions have been created through the completion of the new non-maintained nursery at Trellech Primary School, and completion of the north and south provision for the Pupil Referral Service. This has provided the service with a dedicated high-quality environment and setting, with improved access to outdoor space which is conducive to the needs of the pupils they serve. As part of the completion of new developments, we have given careful consideration to the environmental impact, with low carbon measures included as part of schemes. This includes the installation of air source heat pumps and renewable technologies as part of retrofit and new build design. Improving our built environment through investment in low carbon technologies has continued to feature in our design and development approach, including targeting higher standards of BREEAM performance. Electric Vehicle (EV) charging points have been installed at various council assets. These installations have supported the expansion of the public EV network throughout the county.	Asset Management Strategy and Asset Management Plan Severn View Park New nursery site Pupil Referral Service
How effective is operational Asset Management?	How do we know?
We are undertaking feasibility studies, technical assessments and surveys on property, infrastructure, and assets. These are informing our capital budget planning and maintenance schedules in line with established processes. Decision making on managing our assets will need to be strengthened in line with the mechanisms established in our Asset Management Strategy. We have considerable number of maintenance pressures for our assets, including property and highways infrastructure and public rights of way, that sit outside any potential to fund them within the capital medium term financial plan. These carry significant risk.	Asset Management Strategy and Asset Management Plan Capital medium term financial plan

Progress has been made to strengthen the enablement role of Landlord Services and facilitate increased collaboration across the organisation. This is ensuring the delivery of a cohesive asset management system that aligns with the priorities of the organisation. We need to develop individual Service Asset Plans to inform proactive planning on the potential for assets and developing service requirements can be forecast. We will establish Service Asset Working Groups for each directorate to inform the development of the capital maintenance budget. Landlord services will continue to work with directorates to determine whether the spaces they occupy remain fit for purpose, in the right places, accessible and best meeting current and future service needs.

We aim to achieved further efficiencies in the reporting of property information through the design, procurement and implementation of a new asset management system. This will enable clearer strategic planning with an evolving asset base. Capital funding has been secured for the implementation of the system and procurement of the new system is ongoing.

Digital & Data – Evaluation Score: Level 3 - Adequate

How effective is the development of digital?	How do we know?
We have developed a revised Digital and Data Strategy that sets the direction for the organisation over the next three years We have strong partnership arrangements in place for digital with the Shared Resource Service (SRS), neighbouring Local Authorities and national partners. These have led to the development of five collaborative digital and data projects led by the Shared Resource Service (SRS), focussed on customer services, use of Artificial Intelligence and data insight. These projects are utilising the knowledge and skills within this field in our partnership network and enabling sharing of learning on common issues across Local Authorities We have not been able to fulfil all our digital ambitions in the year, particularly due to reductions in our digital team's capacity. To accelerate our use of digital as means to transform the way we work and deliver our ambitions in the strategy, we have begun the process of transitioning towards a shared service model for digital and data in collaboration with Torfaen County Borough Council and Blaenau Gwent County Borough, as part of an expanded role for the Shared Resource Service. With the digital team beginning to work alongside partner organisations at the earliest opportunity. We also need to strengthen how we priorities digital and data projects based on the outcomes they can achieve and how we subsequently evaluate impact of digital and data, including efficiency and effectiveness. To deliver the strategy and strengthen stakeholder engagement a Strategic Digital, Data and Technology Board and a Digital Steering Group have been established and will be operational this year. We have established information security and technology arrangements ensuring that information held by the council to ensure that information remains confidential, maintains its integrity and is available to those who need to access it as part of our work. We actively support, advise, and train our workforce. Mandatory training is provided for GDPR and cyber security, alongside comprehensive guidance, and policies for all aspects of data management.	Digital Service Business Plan Digital and Data Strategy Information security and governance arrangements. Digital, data and technology collaboration

We have developed a range of training for officers to improve digital literacy across the organisation. These included an essential skills framework for foundational digital skills and a digital induction which will be rolled out on our corporate training platform. We know that continuous development in digital skills is essential to achieve our ambition. We need to continue to develop digital training resources to allow staff to continue to improve their digital skills.	
How effective is the development of data?	
We have been implementing projects in line with our digital and data strategy that are focussed on providing insight using our data to inform our service delivery and policy development. For example, we have developed new performance dashboards for each directorate and our Community and Corporate Plan. We have developed a 'workforce radar' that brings together a range of data to provide strategic insight on the workforce internally. We have run the national resident survey and analysed responses to provide insights into resident views of their local place and council. We have developed the use of geo-spatial data, including automating updates from internal systems and external sources through our Geographical Information Systems (GIS) to inform service delivery. These are providing data insights to inform future planning and service delivery. We have not been able to fulfil all our data ambitions in the year. We do not have all the skills we require to deliver our actions within the council. We need to further harness and connect data as council-wide asset. We also need to improve our data maturity across the organisation. We have ambitions to use data to inform how we transform the way we work and deliver our ambitions in the Community and Corporate Plan. Developing and accessing the capability and capacity required to develop and generate more advanced insights and move to more predictive analysis is an integral part of the investment case we are developing for a modern data service operating across three authorities. We have begun to develop our training for officers to improve data skills. These include training on the use of business intelligence tools and developed data standards for the organisation. We need to continue to develop training resources to allow staff to continue to improve their data skills.	Performance & Data Insight Service Business Plan Digital and Data Strategy
Further areas for development identified through our 2024/25 self-assessment	
Strengthen the capacity and capability to deliver the ambition in the digital and data strategy	

Democracy & Scrutiny – Evaluation Score: Level 4 - Good

How effectively are resources being used?	How do we know?
The use of remote attendance at Council, Cabinet and committee meetings is fully embedded. This brings positive benefits for those with work or family commitments who are able to participate in meetings they would otherwise not be able to attend. Attendance at meetings has remained high. Revisions to the changes of scrutiny committees have reduced duplication, for example budget and performance reports are now presented to Performance and Overview Scrutiny Committee rather than having the same report presented to four separate meetings. There is robust challenge from scrutiny members. The outcomes of scrutiny meetings are	Attendance Figures Scrutiny minutes Annual Governance

clearly captured and shared with cabinet and officers to consider. A forward work planner is used to identify decision making reports due to considered by Council, Cabinet and Individual Cabinet Member decision. This is also used to inform the work programme of scrutiny committees. The use of the planner will be strengthened to ensure decision making reports are included on it at the earliest opportunity to support improved democratic work planning.	Statement Forward work planner
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Our work with others

To deliver the outcomes required for the county we need to work together with a range of partners, stakeholders and our communities. The council will not have all the answers to solve the challenges facing the county and we will not be able to deliver the outcomes required on our own. Working collaboratively with others increases the likelihood of us developing effective and sustainable solutions.

Stakeholders and partnership working

How effectively does the council work with stakeholders and partners on agreed outcomes?	How do we know?
Working in partnership is one of the ways we can achieve our objectives while delivering value for money. We enter into collaborative arrangements thoughtfully and with a clear articulation of how they can help us achieve our objectives. Regionally we work with many large organisations in partnership including Welsh Government, Cardiff Capital Region, Regional Partnership Board and the Gwent Public Services Board to fulfil our commitments on, for example, decarbonisation, transport, health and social care, housing and regeneration. An Internal Audit review identified a reasonable level of assurance was in place for the authority's governance arrangements based on a sample of partnerships. The audit identified we need to strengthen our guidance on the arrangements that partnerships need to have in place and assure ourselves these are subsequently adhered to. We have created a partnership toolkit to support lead council officers to develop and capture the arrangements for their partnership. We need to complete its implementation for those partnerships we have identified on our partnership register. Including, applying it to evaluate if the expected outcomes of the partnerships are being realised. The South East Wales Corporate Joint Committee (CJC) was given the legal responsibility for preparing Regional Strategic Development Plans, Regional Transport Plans and for doing whatever is deemed necessary to enhance or promote the economic well-being of the area. The committee is made up of the leaders of the ten local authorities in South East Wales. All governance papers are published on the Cardiff Capital Region website. The arrangements are overseen by a joint committee comprising representatives from the ten local authorities with additional regulatory activity undertaken by Audit Wales. Partnerships and collaborations of all scales are important to deliver improved outcomes in the county. We are committed to strengthening our collaboration with community and town councils and lean into the expertise and enthusiasm of the many volunteers and community groups that make this county so special.	Internal Audit review of Partnerships and collaborations

Our Actions

Through the self-assessment, we have identified how well we are doing and what we can we do better. Identifying these is not the end of the self-assessment process. We will look to build on and learn from the areas that are going well and address areas that we can do better.

The action plan focuses specifically on what, and how, we can do better for the significant conclusions of the assessment. All of the findings will inform the development of the council's well-being objectives and delivery plans. They will inform how internal processes and procedures should change to support more effective planning, delivery and decision-making to drive better outcomes, and ways to deliver the council's functions. These also integrate with further actions identified in the council's Annual Governance Statement 2024/25.

The actions will be monitored through the year as part of the council's performance management arrangements. The next self-assessment report will also include an assessment of the progress made on these actions.

Progress with 2023/24 Actions?

We have provided an update on progress against the actions we identified in the 2023/24 self-assessment report. A more detailed assessment of these arrangements is provided in the relevant section of the report.

Section	What can we do better	How	Progress
Outcomes	Ensure interventions to achieve a Fair Place to Live objective are evidence-based, targeted, clearly communicated and evaluated to assess impact	Develop a poverty and inequality action plan to deliver the commitments in the Community & Corporate Plan 2022-28	A Tackling Poverty and Inequality Lead was appointed in April 2024. It has been agreed that a new strategy or formal tackling poverty and inequality action plan is not the preferred option at this time. The Community Development Team, who coordinate delivery of our work on poverty and inequality, have developed a targeted action plan for 2025/26.
Outcomes	Ensure early and help prevention services are effectively able to meet current and prevent, as far as possible, future demand	Complete an evaluation of the performance of early help and preventive services, as part of the Director of social care annual report and use the findings to inform future action	The Social Care & Health Director's report 2023/24 included an assessment of early help and preventive services. The impact of these services is also assessed under the A Connected Place Where People Care Objective.
Outcomes	Increase the focus of council activities on improving the social determinants of health	Use the recommendations in the Building a Fairer Gwent: Improving health equity and the social	The recommendations in the Building a Fairer Gwent: Improving health equity report continue to inform the council's activity. Including, embedding these in the development of a strategy focussed on enhancing

		determinants report to inform the council's service planning	wellbeing, resilience and prevention for adult residents who are on the threshold of needing formal care and support.
Outcomes	Ensure the delivery of the action plan which aims to address recommendations identified by Estyn	Deliver and assess progress on the Estyn recommendation Action Plan	The Children and Young People's Chief Officer's Report provided an assessment of progress against Monmouthshire's Estyn Recommendations.
Outcomes	Develop the support offer for schools and pupils to reduce and prevent exclusions	Develop an Inclusion Strategy for delivery of inclusion services across Monmouthshire	We have developed a new Inclusion Strategy that sets out our priorities to improve outcomes for children and young people in vulnerable groups and their families.
Outcomes	Develop the support offer for disadvantaged learners to achieve their potential	Developing a whole authority approach on supporting disadvantaged learners, including working with the EAS.	We continue to work with the EAS to support disadvantaged learners. This action will be carried forward to the 2024/25 action plan.
Enablers	Increase the focus on outcomes in the measurement framework of the Community and Corporate Plan	Review and revise the measurement framework of the Community and Corporate Plan	The measurement framework for the Community and Corporate plan has been revised and used in this self-assessment report.
Enablers	Strengthen arrangements that support workforce planning and management	Develop and deliver the action plan in the People Strategy	A People Strategy for the council has been developed. An assessment of our arrangements to support our workforce is included in this self-assessment. A separate assessment of performance of the commitments in the People Strategy has been completed.
Enablers	Strengthen arrangements that support officers undertaking procurement to meet the ambitions of the Socially Responsible Procurement Strategy	Develop consistent guidance, training, and support for officers undertaking procurement	An assessment of our procurement arrangements is included in this self-assessment. A separate assessment of performance of the commitments in the Socially Responsible Procurement Strategy has been completed. This identifies these arrangements require further development. This action will be carried forward to the 2024/25 action plan.
Enablers	Strengthen the capacity and capability to deliver the ambition in the digital and data strategy	Develop and deliver the action plan in the Digital and Data Strategy	We have developed a Digital and Data Strategy. A separate assessment of performance of the commitments in the Digital and Data Strategy has been developed. We have begun the process of transitioning towards a shared service model for digital and data in collaboration with Torfaen County

Borough Council and Blaenau Gwent County Borough, as part of an expanded role for the Shared Resource Service (SRS). This action will be carried forward to the 2024/25 action plan.

Stakeholder and Partnership	Evaluate if the expected outcomes of partnerships are being realised and impact on delivering the council's objectives	Implement the partnership toolkit to facilitate lead council officers for identified partnerships to evaluate if the expected outcomes of the partnerships are being realised	A partnership toolkit has been developed. This requires further facilitation to support Council lead council officers for identified partnerships to implement it. This action will be carried forward to the 2024/25 action plan.
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New Areas for Development: What and how can we do better?

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Section	What can we do better	How	Who	When
Outcomes	Develop more childcare places, including Flying Start and Welsh-medium childcare provision	Implement the action plan as part of Childcare Sufficiency Assessment	Strategic Director Learning, Skills and Economy	March 2027
Outcomes	Understand the reasons for the rise in young people Not in Employment, Education or Training	Implement the NEET Prevention Strategy and targeted support with partners	Strategic Director Learning, Skills and Economy	March 2026
Outcomes	Develop the support offer for disadvantaged learners to achieve their potential	Develop a whole authority approach on supporting disadvantaged learners, including working with the EAS	Strategic Director Learning, Skills and Economy	To be set
Enablers	A programme of service change which identifies sustainable ways to deliver services whilst addressing the forecast funding gap.	Develop a programme of change to enable delivery of required savings over the medium term.	Strategic Leadership Team	September 2025
Enablers	Strengthen arrangements that support officers undertaking procurement to meet the ambitions of the Socially Responsible Procurement Strategy	Develop consistent guidance, training, and support for officers undertaking procurement	Deputy Chief Executive & Chief Officer Resources	December 2025

Enablers	Strengthen the capacity and capability to deliver the ambition in the digital and data strategy.	Develop and deliver the action plan in the Digital and Data Strategy	Deputy Chief Executive & Chief Officer Resources Chief Officer People, Performance and Partnerships	March 2026
Stakeholder and Partnership	Evaluate if the expected outcomes of partnerships are being realised and impact on delivering the council's objectives.	Implement the partnership toolkit to facilitate lead council officers for identified partnerships to evaluate if the expected outcomes of the partnerships are being realised.	Chief Officer People, Performance and Partnerships Partnership lead officers	March 2026

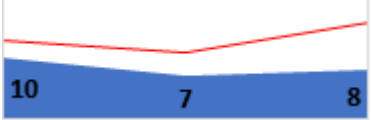
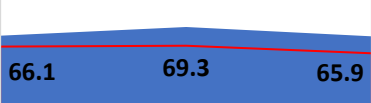
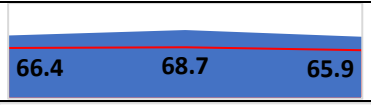
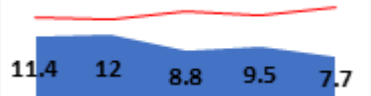
Performance Measures

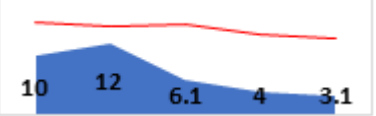
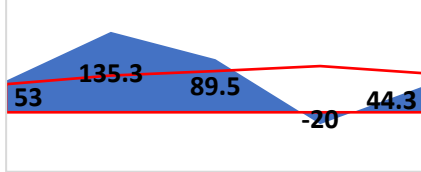
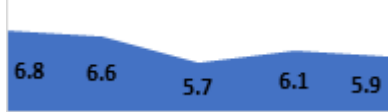
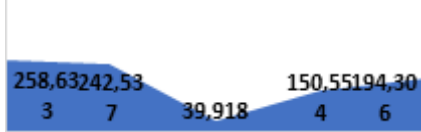
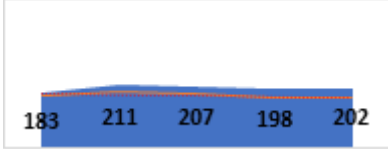
The use of performance measures is one of the important mechanisms we use to assess our performance. Each of our objectives has specific performance measures set to monitor progress. Some further relevant performance indicators we use to assess our services' performance are set out in this section.

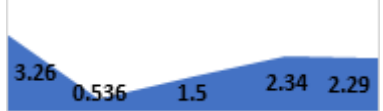
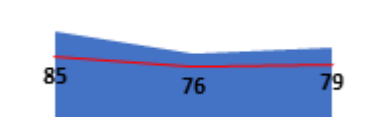
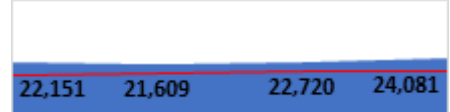
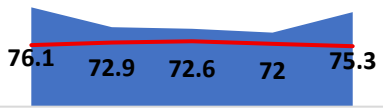
National indicators have been set as part of the Future Generations Act for the purpose of measuring progress towards the achievement of the well-being goals in Wales as a whole. While the national indicators will not measure the performance of individual public bodies or public services boards, it is important that they are considered to track the progress being made to improve well-being in Monmouthshire. Some of the national indicators that are relevant to the objectives we have set, where an update is available at a county level, are included in the table below.

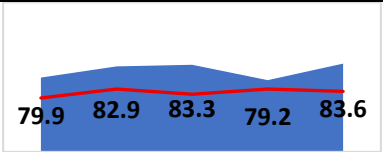
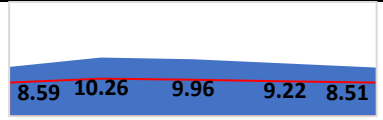
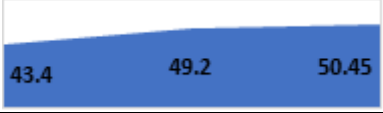
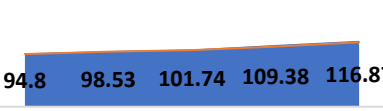
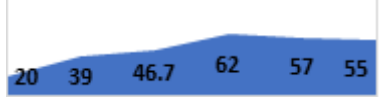
Longer term measures in the Community & Corporate Plan 2022-28

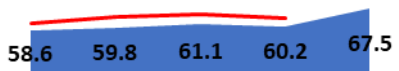
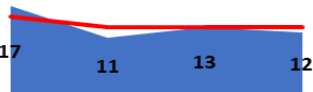
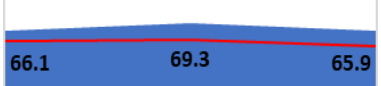
Alongside the specific measures included under each objective the Community and Corporate Plan also includes measures for each objective that we want to track because they will inform our work. We want to see positive movement in these measures, but they are things where our input is only part of a much bigger picture. The latest update of the measures can be seen below. The red comparator line in some graphs seen below displays the Wales average data, where available.

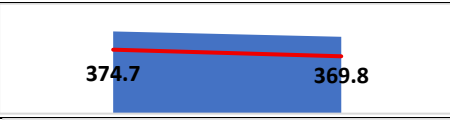
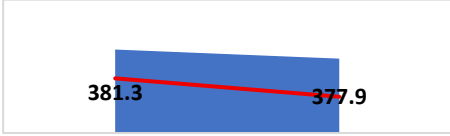
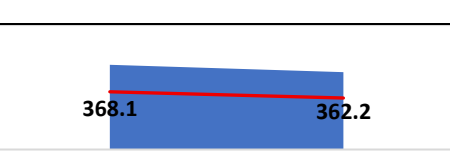
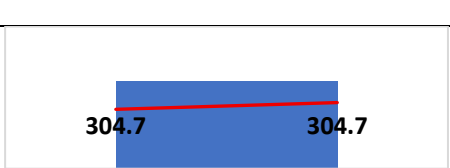
Longer term measures in Community & Corporate Plan 2022-28	Trend (Wales trend in red where available)	Latest
A Fair place to live		
Percentage of people satisfied with their ability to get to/ access the facilities and services they need		86
Percentage of people living in households in material deprivation		8
Healthy life expectancy - female (years)		65.9
Healthy life expectancy – male (years)		65.9
Gap in healthy life expectancy between most and least deprived areas - female (years)		7.7

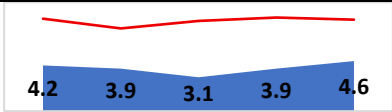
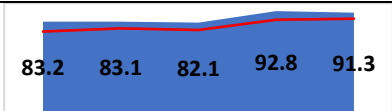
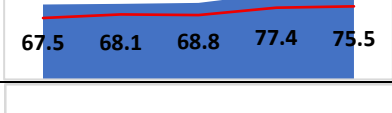
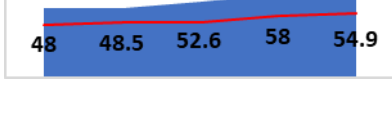
Gap in healthy life expectancy between most and least deprived areas – male (years)		3.1
Difference in average pay between men and women working in the county (£)		44.3
Percentage of children living in relative low-income families		17.4
Percentage of residents who feel 'People in my local area get on well and help each other'	New measure – trend data not yet available	78.1
Percentage of residents who feel 'People in my local area pull together to improve the local area'	New measure – trend data not yet available	63.8
A Green place to live		
Average carbon emissions per capita in Monmouthshire (tonnes)		5.9
Number of rail passenger journeys		194,306
Average level of nitrogen dioxide pollution in the air (µg/m3), measured at Air Quality Management Areas in Monmouthshire		6
Average annual residual household waste produced per person (kilograms)		202
Percentage of the Special Area of Conservation river catchment waterbodies that fail the phosphorus targets	Trend data not available	88 for Usk 67 for Wye

Percentage of people who agree that their local area has a clean environment	New measure – trend data not yet available	58.7
A Thriving and Ambitious place		
Percentage of people satisfied with their local area as a place to live		95
Average hourly town centre footfall		288
Percentage of vacant town centre premises		10.9
Annual economic impact of tourism (£)		329.8
Number of tourists visiting the county (million)		2.29
Percentage of people who attend or participate in arts, culture or heritage activities three or more times a year		79
Percentage of adults with qualifications at different levels of the national qualification framework i) no qualifications, ii) qualified to level 2 or above, iii) qualified to level 3 or above iv) qualified to level 4 or above	Update in learning place below	Update in learning place below
Gross disposable household income per head (£)		24,081
Percentage unemployed i) females ii) males	Data not available	Data not available
Percentage employed – female		75.3

Percentage employed – male		83.6
Percentage of council expenditure spent in local supply chain through public sector contracts	Data not yet available	Data not yet available
Percentage increase in active travel route usage	New measure – trend data not yet available	4.1
A Safe Place to Live		
Median house prices compared to median workplace-based earnings		8.51
Percentage of all homes in the county with an energy efficiency rating of 'C' or above		50.45
Average weekly rent for social housing in Monmouthshire		116.87
Average time (months) homeless households spend in Band 1 with a homeless duty before moving on to settled/permanent accommodation		13.8
Percentage of social housing allocated to homeless households		55
Number of overall crimes recorded		6152
Number of recorded crimes - sexual offences		200

Number of recorded crimes - public order offences		722
Rate of anti-social behaviour incidents per 1,000 population		13.04
Percentage of residents who feel safe when outside in their local area during the i) day ii) night	New measure - trend data not yet available	i) 90.29 ii) 66.19
Percentage of those referred to the youth offending service who subsequently re-offend		12.5
A Connected Place Where People Care		
Percentage of children supported to remain living with their family (not including children looked after)		67.5
Percentage of adult service users who feel part of their community		50.2
Percentage of children looked after supported to remain in Monmouthshire		45.8
Number of carers and young carers supported by the carers team		97
Percentage of people who are lonely		12
Percentage of adults with two or more healthy lifestyle behaviours	Trend data not available	93
Healthy life expectancy at birth (women)		65.9
Healthy life expectancy at birth (men)		65.9

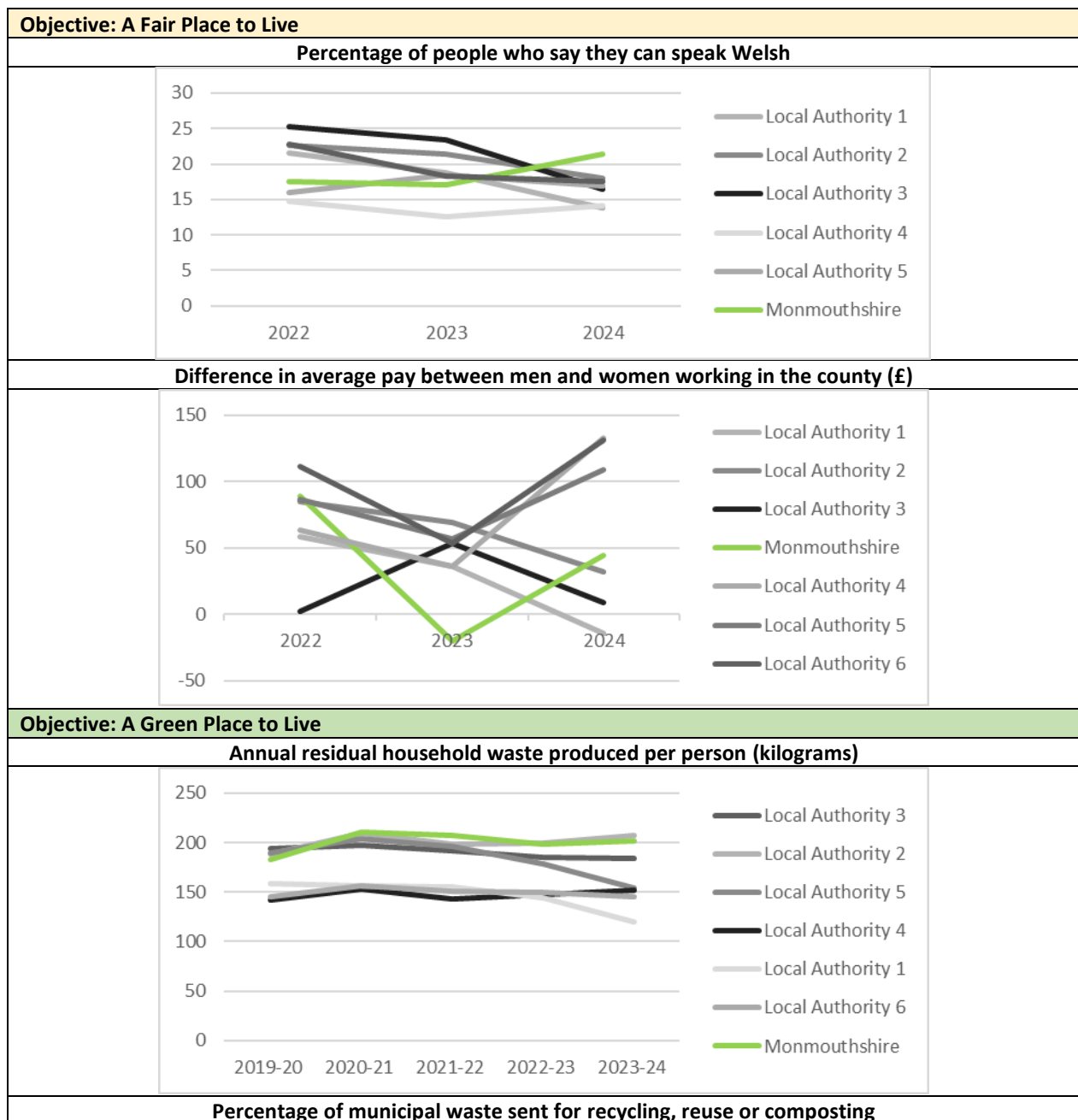
Percentage of people who agree 'People in my local area get on well and help each other'	Trend data not available	78.1
A Learning place		
Number of permanent exclusions across primary and secondary schools		22
Rate of permanent exclusions across primary and secondary schools		2.34
Rate of fixed term exclusions 5 days or less i) primary ii) secondary More than 5 days iii) primary iv) secondary	Trend data not yet available	i)29.1 ii)394.0 iii)1.1 iv)9.0
Capped 9 Point Score – All pupils		369.8
Capped 9 Point Score - Females		377.9
Capped 9 Point Score - Males		362.2
Capped 9 Point Score - eFSM		304.7

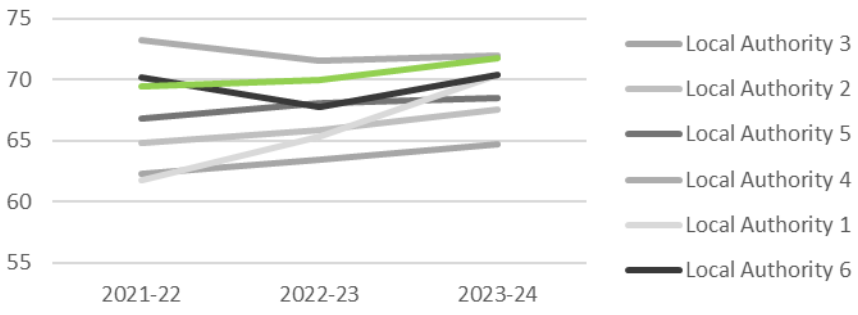
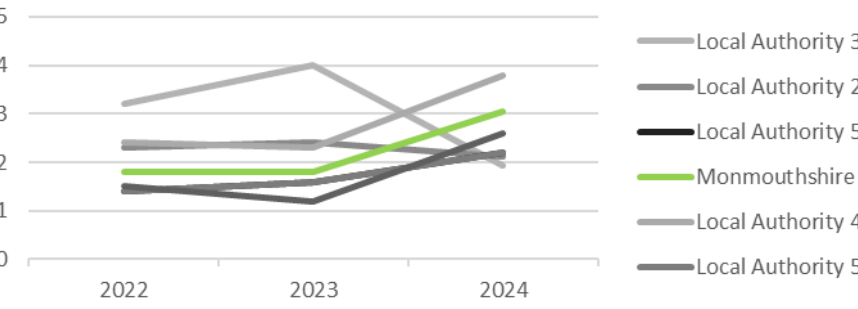
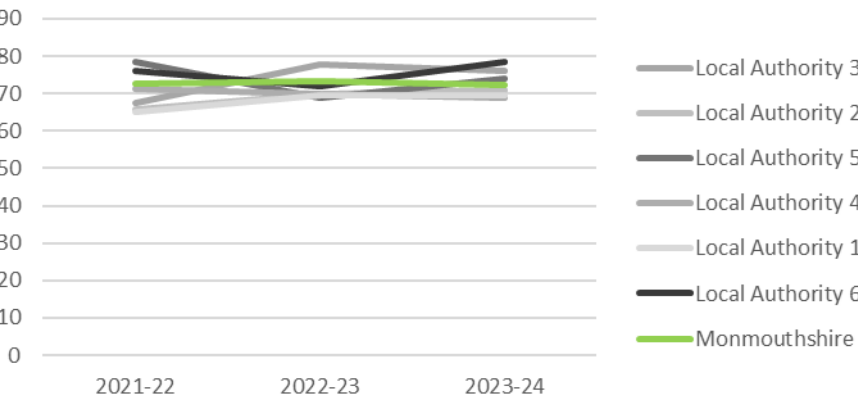
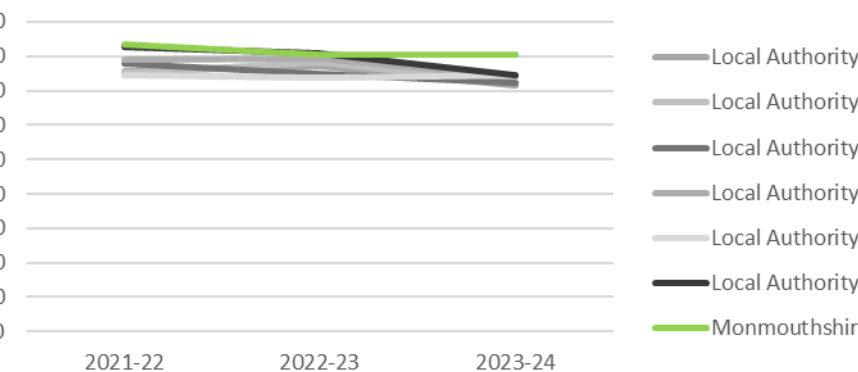
Percentage of adults with qualifications at different levels of the national qualification framework i) no qualifications		4.6
Percentage of adults with qualifications at different levels of the national qualification framework ii) qualified to level 2 or above		91.3
Percentage of adults with qualifications at different levels of the national qualification framework iii) qualified to level 3 or above		75.5
Percentage of adults with qualifications at different levels of the national qualification framework iv) qualified to level 4 or above		54.9
Percentage of learners studying for an assessed qualification in Welsh as a subject	Trend data not yet available	93.3%

Performance comparable with other areas

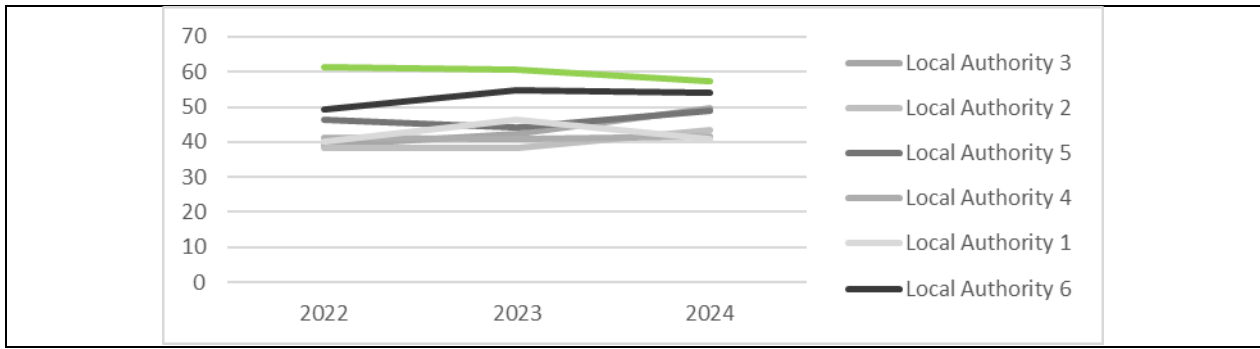
When assessing performance, it is essential to ensure wider context and relative performance is considered to offer a well-rounded evaluation.

Through our self-assessment we have assessed our progress using both local and national metrics. Some of these national metrics are comparable with other local authorities across Wales. The table below provides an overview of how we are performing against some of our 'nearest neighbours'. These 'neighbours' are those authorities with which we share a wide range of similar characteristics, for example rurality, population demographics, and local economic factors. These may not always correlate with nearest geographic neighbours. The selection of nearest neighbours is based on ONS analysis which assesses a range of data and evidence to ensure a fair comparison.



	 Local Authority 3 Local Authority 2 Local Authority 5 Local Authority 4 Local Authority 1 Local Authority 6	
Objective: A Thriving and Ambitious Place		
Percentage of school leavers known not to be in Education, Employment or Training (NEET)		
	 Local Authority 3 Local Authority 2 Local Authority 5 Monmouthshire Local Authority 4 Local Authority 5	
Percentage employed (aged 16-64) - Female		
	 Local Authority 3 Local Authority 2 Local Authority 5 Local Authority 4 Local Authority 1 Local Authority 6 Monmouthshire	
Percentage employed (aged 16-64) - Male		
	 Local Authority 3 Local Authority 2 Local Authority 5 Local Authority 4 Local Authority 1 Local Authority 6 Monmouthshire	
Objective: A Safe Place to Live		
Median house prices compared to median workplace-based earnings		

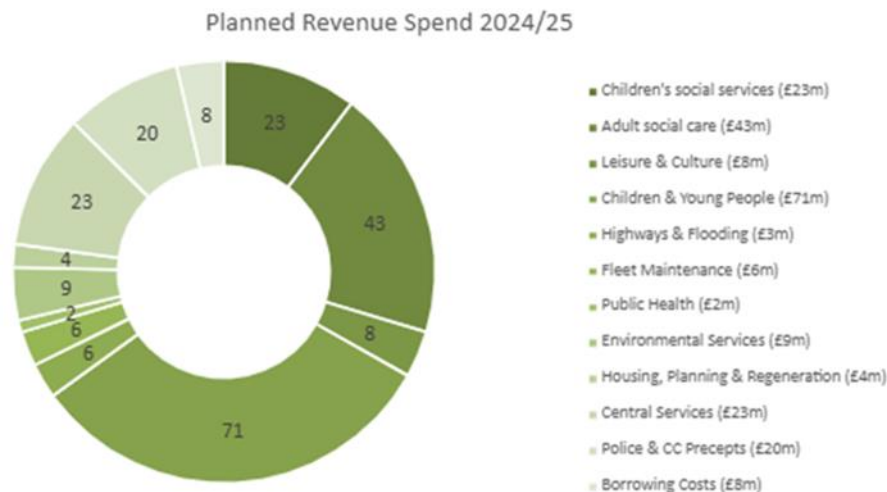




What we spent in 2024/25

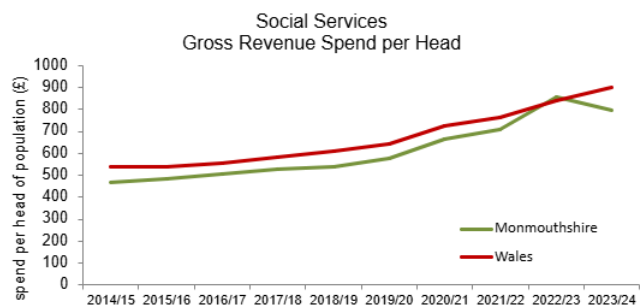
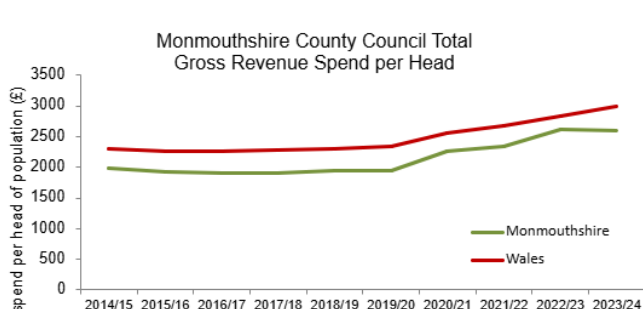
In 2024/25, the council's planned spend was £220 million to provide services for Monmouthshire residents.

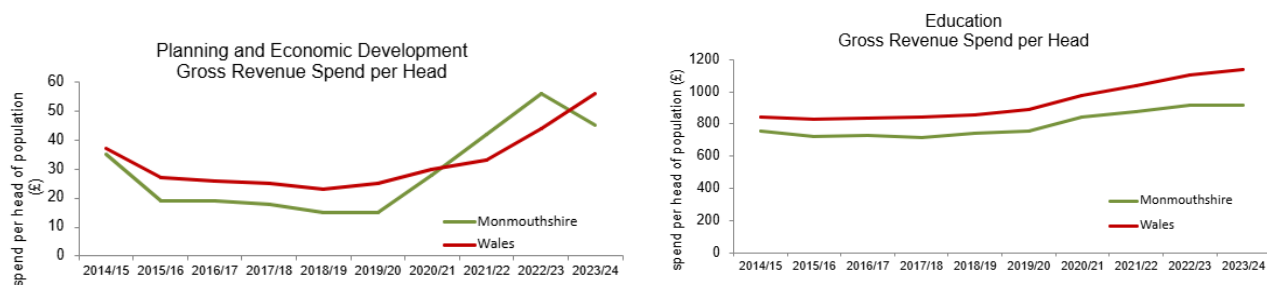
The proportion of our spending on different services in 2024/25 is shown in the diagram. These services are paid for by a combination of central government grants, council tax and non-domestic rates. Council tax is also used to fund the services of the Police and crime commissioner for Gwent and Community Councils.



How our revenue spend compares with other areas

The graphs below show how much we spend per head of population in some of our priority areas. In 2023/24, the latest year comparative data is available, we had the lowest gross revenue spend per head of all councils in Wales. We spend less than the Wales average on education services, social services and planning and economic development. We have continued to work hard to make sure this money goes where it matters. For 2024/25 we received an increase in core funding; however, our budget settlement from the Welsh Government was the lowest per head of population of councils in Wales.





What citizens said

Involvement and working together with residents and communities in Monmouthshire is essential to develop and deliver solutions to achieve outcomes and ensure residents are involved in the decisions that affect them.

Through our self-assessment we have used the views of service users and residents to inform our assessment. Some of the specific engagement exercises we undertaken to involve citizens this year include:

Budget engagement: Monmouthshire County Council launched its draft budget proposals for 2025-2026 in January 2025. Communities were invited to share their views on these possible changes in an open consultation process. A range of information on the proposals and their potential impacts was shared. Face-to-face budget consultation events took place, as well as online budget sessions. For those unable to join the livestream, the session was uploaded to the website to watch after the event. As part of the consultation process, residents were also asked to share their thoughts via a feedback survey on the budget proposals, which were shared across our social media platforms. The feedback received informed the development of our final budget proposals.



Regeneration Proposals: We are working in partnership with town councils and other key stakeholders to drive and oversee the development of placemaking plans in Monmouth, Abergavenny and Magor with Undy. To inform these plans a range of consultation events were held including face-to-face engagement opportunities, displays were held in the local area on plans and designs and surveys provided. Initial discussions have taken place with local stakeholders about a new placemaking plan for Caldicot. We have invited expression of interest from eligible businesses in Monmouthshire town centres for the Monmouthshire Town Centre Property Improvement Grant. This is funded through the Welsh Government's Transforming Town Placemaking Grant and Monmouthshire County Council. The grant provides financial support for improvements to properties in the designated town centres of Abergavenny, Caldicot, Chepstow and Monmouth.

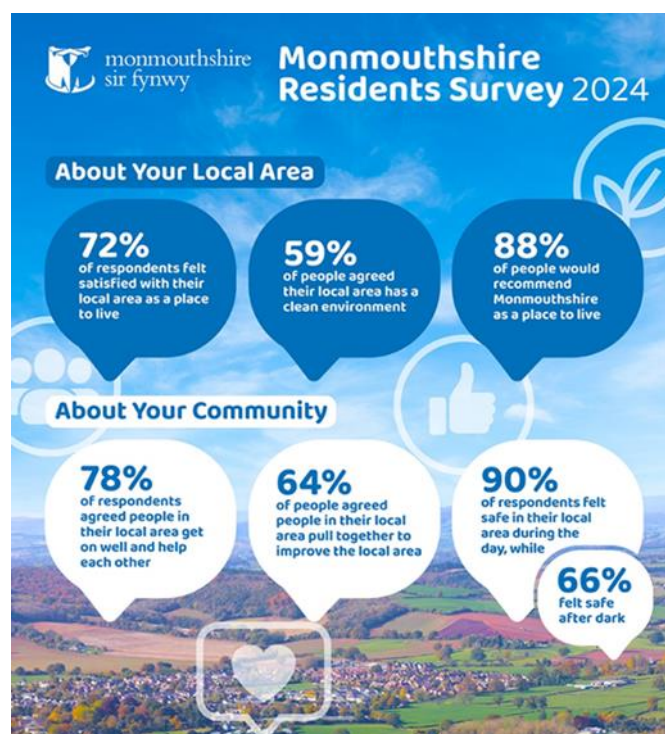
Replacement Local Development Plan: In October, Council endorsed the Replacement Local Development Plan (RLDP) for public consultation which was held between November and December 2024. This included

a series of both in-person and online events as well as specific engagement with local businesses. Residents and local businesses were invited to share their thoughts on the Deposit Plan to enable them to shape its development. The findings of the consultation will be considered by full Council in Autumn 2025.

Customer Complaints and Compliments: We monitor and learn from feedback received from customers. These are reported to the Governance and Audit Committee. Issues included the length of time we can take to respond to people. Not only is it important to deal with complaints effectively, investigating and putting things right for the complainant where necessary, it is also vital to learn from them to minimise the chances of the same problem occurring twice. Twenty-nine complaints about Monmouthshire County Council were received by Public Service Ombudsman for Wales in 2023-24, the last year for which data is available, an increase from twenty-three during 2022-23. Monmouthshire is below the average levels of complaints reported to the Ombudsman at 0.31 per 1,000 residents. This ranges from 0.15 to 0.58 with an average of 0.36.

National Residents Survey: During the Autumn of 2024, we conducted a resident survey on everyday life in Monmouthshire. Hosted by Data Cymru, the survey was part of their National Residents Survey, designed to support local councils in increasing their understanding of performance and perception. Residents were asked about their experiences in the local area, their views on the council's services, and how we, as a council, can improve things. Thanks to the engagement from residents, we received 1,465 responses. We have analysed the survey results to understand what respondents said about their local area, the council and their interactions with the council. The evidence from the survey provides us with a fuller picture of how people feel in the county and the valuable feedback will help inform our services. The full results are available on <https://www.monmouthshire.gov.uk/monmouthshire-resident-survey/>. The survey is one mechanism to help us understand residents' views, alongside a range of feedback collected across services, which will provide a more detailed understanding of the council's services.

Respondents were asked questions about their local area, some of the key results are shown in the graphic below:



The responses show that residents are satisfied with their local area as a place to live, assist each other in their communities and support their local place in Monmouthshire. We know this isn't always the case for everyone, and we are focussed on our objective in the Community and Corporate Plan to make Monmouthshire a fair place to live where the effects of inequality and poverty have been reduced.

Overall, a significant majority of respondents felt safe in the day, with most feeling safe at night, although fewer than in the day. Feelings of safety varied by age and place. We are focussed on delivering our objective for Monmouthshire to be a safe place to live where people have a home and community where they feel secure.

Those younger people who responded to the survey reported lower levels of satisfaction with Monmouthshire as a place to live. The council's deposit Replacement Local Development Plan identifies this as one of its key issues, ensuring our communities are socially and economically sustainable by providing accessible places to live and work and a choice and range of homes to retain and attract younger people and rebalance our ageing demography.

We asked questions about the council to understand people's views on local service delivery, interaction with the council and democratic representation. Key results about the council are shown below:



Overall, fewer than half of the respondents were satisfied with how the council operates, its communication methods, and the level of trust they felt toward the council. We are dedicated to upholding the council's core values of Teamwork, Openness, Fairness, Flexibility, and Kindness in the delivery of our services, and the survey responses highlight the importance of consistently reflecting these principles in all the council's activities.

Slightly more than half of respondents felt the council provides high quality services, with satisfaction varying by service from higher levels in waste management to lower levels in other service areas. Respondents reported generally higher satisfaction levels with their experience of specific council processes, such as making payments and requests.

We are committed to using residents and services users' views in the evaluation of our performance. Service areas will use the responses from this survey to inform their planning and evaluate their performance against the objectives we have set. We remain committed to working with communities and businesses to improve things and make Monmouthshire an even better place to live.

Staff engagement

As part of our process to collate the self-assessment, we held directorate and enabling-service workshops to provide an opportunity for staff to directly feed into the self-assessment via identification of their own strengths and areas for development. Workshop attendees were presented with evidence packs, collated from existing information sources such as scrutiny reports, external regulator feedback, and service business plans, and were facilitated to self-assess their performance. A range of evidence was gathered from the workshops, both in terms of successes and areas for development associated with our strategic goals and our enabling functions, but also on how to strengthen the self-assessment process.

We have also used evidence gathered from a range of staff events and groups. These include the relaunched People Leaders Workshops and team Q&A sessions which are held face-to-face in peoples' workplaces. We have held two face-to-face staff conferences in the north and south of the County and will be holding an online version. We also completed a new staff survey to enable us to understand how connected people feel to the organisation. The use of these sessions, networks, digital communication, surveys and feedback loops to senior managers, has extended the reach of contact with the workforce.

Businesses

We have established stronger engagement networks with businesses in our area since the pandemic and are working to maintain and improve these connections. We have a better understanding of the types of businesses in our area. We have continued to engage with businesses through our new customer relationship management system which acts as a database of Monmouthshire businesses and a tool to promote the advice and guidance services that we can provide to pre-starts and existing businesses. Our Business Data & Communications Officer has continued to improve our links with businesses and has helped to improve feedback loops with businesses to ensure we are capitalising on the conversations that are taking place and can improve our service as a result. This feedback will continue to inform our self-assessment.

Trade Unions

We engage well with Trade Unions to achieve our outcomes. We have briefed them on the process we undertake to complete our self-assessment and shared our initial findings with them as part of our self-assessment process. We have developed a Social Partnership Duty Report 2025, setting out how we will build on existing practice, and work collaboratively with trade unions, in line with the requirements of the Social Partnership and Public Procurement (Wales) Act 2023.

What Regulators and Inspectors Said

We work closely with our regulators and inspectors to quality-assure our activities as this is vital to ensuring improvement. Their feedback is valued, and we use their assessments to help us focus on the things we need to improve across the council.

Each year, Audit Wales publishes an Audit Plan setting out the work they plan to undertake at the council. As part of the plan, they have undertaken a range of audits during the year. These included:

- Financial sustainability: The report found that although the council is developing a longer-term approach to financial planning, it is yet to identify how it will close its future funding gap. Given its low reserves levels, the council will need to work at pace to implement its financial strategy and strengthen its financial resilience
- Performance Management Arrangements: The report concludes that the council has proper arrangements in place to manage its performance and is proactive in identifying areas for improvement.
- Digital Strategy Review: The report concludes the council does not have a clearly articulated strategic approach to digital. The report recognises the council currently does not have a digital strategy and its current digital work is detailed within individual service business plans and some project work. It also acknowledges the council intends to develop a new digital strategy to help clarify the role that digital technology will play in the council. We have now developed a digital and data strategy for 2024-2027.
- Unscheduled Care (regional review): The work examined whether health boards and local authorities have effective arrangements in place to ensure the timely discharge of patients out of hospital. The report makes several recommendations for both the health board and local authority to respond to and a collective response to address these has been developed.
- Assurance and Risk Assessment work in the council during 2024/25. This reviewed the arrangements the council has put in place to secure value for money in the use of its resources in line with the Auditor General's duties. The assessment is also used to inform our work planning for future years.

We have developed responses to the recommendations in these reports and the progress in delivering these is regularly reported to the council's Governance & Audit Committee. Reports produced by Audit Wales are available to download on their website (www.audit.wales/publications). This includes local government national reports.

We underwent an Estyn Inspection into Local Government Education Services in February 2020. The inspection recognised the clear vision and strong focus on ensuring 'the best possible start in life' and identified the commitment to partnership working that has resulted in a good track record of improvement. It also identified areas for development, such as the performance of children eligible for free school meals, and a lack of clarity in how services for learners with special educational needs will be strengthened. The progress in addressing the four recommendations in the report has been evaluated in the Children and Young People's Chief Officer's Report 2023/24, with all four being assessed as making 'good progress'. The progress report can be found here [Children and Young People's Chief Officer's Report 2023/24 \(monmouthshire.gov.uk\)](https://www.monmouthshire.gov.uk/children-and-young-people). The full Estyn report, and other Estyn reports related to Monmouthshire and schools in the county, can be found on www.estyn.gov.wales

Care Inspectorate Wales carried out an improvement check of Monmouthshire County Council's adult services in April 2025, following up on their Performance Evaluation Inspection (PEI) conducted in July 2022. The inspection assessed the progress made in addressing previously identified areas for improvement. The review found key strengths in our establishment of a place-based approach and implementation of the commissioning strategy, the improved availability of domiciliary care and development of reablement approaches reducing or mitigating the need for ongoing support. Areas requiring further development identified include the need for improvement in risk identification, staff

engagement and communication and support for carers. We have developed a response to address the areas for improvement identified.

The full inspection report, and other inspection reports about Monmouthshire social services by Care Inspectorate Wales (CIW), can be found on www.careinspectorate.wales

Equality and Diversity

The council has a long-standing commitment to equality and diversity. Our fourth Strategic Equality Plan, produced under the Equality Act 2010 sets the council's objectives to ensure we deliver better outcomes for people with protected characteristics. This is clearly aligned with the evidence provided by the Well-being Assessment, and evidence provided by the Equality and Human Rights Commission's report "Is Wales Fairer 2023".

As well as this, it is important to us as it is the right thing to do. We produce annual monitoring reports that provide updates on progress on the action plan in the Strategic Equality Plan and evidence good practice being carried out across the council departments. These can be found [here](#).

The Welsh Language

The Welsh language is central to the goals introduced as part of the Well-being of Future Generations Act, particularly for our contribution to a Wales of vibrant culture and thriving Welsh language. It also makes an important contribution to the Welsh Government goal of having a million Welsh speakers by 2050.

The Welsh Language (Wales) Measure 2011, and accompanying Welsh Language standards, place a legal duty on councils to treat Welsh and English equally, to promote the Welsh Language and provide services to the public through the medium of Welsh. There are 176 standards that apply to the council. This is a significant challenge, but systems have been put in place to comply with these. We have a Welsh Language Strategy for 2022-2027, which identifies a vision of how the language will look in Monmouthshire in five years and is accompanied by targets to help achieve it. We produce annual monitoring reports that assess our progress against our Welsh language commitments under the Welsh Language (Wales) Measure 2011 and the Welsh Language Standards. These can be found [here](#).

Appendix 1 – Self-assessment process

Legislation

The Local Government and Elections (Wales) Act 2021 provides for a new and reformed legislative framework for local government elections, democracy, governance and performance. The Act replaces the previous improvement duty for councils set out in the Local Government (Wales) Measure 2009. The Act requires each council in Wales to keep under review the extent to which it is meeting the ‘performance requirements’, that is the extent to which it is exercising its functions effectively; it is using its resources economically, efficiently and effectively; its governance is effective for securing these.

The performance and governance provisions in the Act are framed within the context of the well-being duty in the Well-being of Future Generations (Wales) Act 2015, which sets out a legally binding common purpose for public bodies to improve the social, economic, environmental and cultural well-being of Wales.

The mechanism for a council to keep its performance under review is self-assessment, with a duty to publish a report setting out the conclusions of the self-assessment once in respect of every financial year. Self-assessment will be complemented by a panel performance assessment once in an electoral cycle, providing an opportunity to seek external insights (other than from auditors, regulators or inspectors) on how the council is meeting the performance requirements.

Why?

Self-assessment is a way of evaluating, critically and honestly, the current position to make decisions on how to secure improvement for the future. It is about the council being self-aware, understanding whether it is delivering the right outcomes, and challenging itself to continuously improve. It needs to be embedded as effective self-assessment helps the council to continually learn and achieve sustainable improvement and better outcomes for citizens, service users and its own workforce.

The WLGA have identified draft principles for self-assessment for councils to ensure that they have arrangements in place that:

- demonstrate self-awareness derived from evidence-based analysis that focuses on outcomes;
- are owned and led at a strategic level and are not an exercise in compliance;
- further develop a culture of challenge to facilitate improvement as part of an ongoing process;
- are integrated as part of the council’s corporate planning, performance and governance processes; and
- enable an organisation-wide assessment rather than an assessment of individual services.

Further developing this culture and embedding an evaluative mindset will be a key development point through the continued production of the self- assessment report.

Process

The council has developed a process to undertake its self-assessment under the Act, assessing performance in the 2024/25 financial year. The main component parts of the process and timeline are:

April - May	May - June	June - July	July	September
Desk-based evidence gathering	Directorate self-assessment Workshops	Council self-assessment report drafted	Draft report to Scrutiny and Governance & Audit Committee	Self-assessment agreed in line with council process.

This timeline ensures that the self-assessment can inform and be informed by the policy direction of the council and how it uses its resources efficiently and effectively, particularly the budget setting process.

Evaluative evidence to inform the assessment has been compiled at a directorate level. Most of the evidence has been collated by using intelligence already held corporately in an insightful way; this includes, for example, the Annual Governance Statement, audit and inspection reports, and service level business plans.



The evidence gathered has been explored further, and challenged where necessary, at directorate and enabling function based self-assessment workshops, to determine if the objectives (outcomes) of the council are being achieved.

Self-assessment workshops

Directorate workshops	Enabling functions workshops
Learning, Skills & Economy	People
Social Care & Health	Asset Management
Place	Finance
Infrastructure	Procurement
Customer, Culture & Well-being	Digital & Data

The workshops were facilitated through the following questions:

- How well are we achieving our agreed outcomes? (Community & Corporate Plan objectives)
- How do we know? (Evidence)
- How effectively are resources being used to deliver our priorities? (Enablers)
- How effectively does the council work with stakeholders and partners on agreed outcomes? (Partnership working)
- What could we do better? (Actions – including a review of actions from the previous report)

The full evidence and conclusions from workshops have been collated and will be used by directorates and enabling functions to inform their services business plans.

Following the workshops, the evidence has been reviewed, further challenged, and collated into a corporate level evaluative self-assessment. This has been integrated with the council’s requirement to report on the progress it has made in meeting its well-being objectives for the preceding financial year (2024/25) under the Well-being of Future Generations Act.

The report is structured under these headings:

- Understanding our local place
- Outcomes (progress against our objectives):
 - How well are we achieving our agreed outcomes?
 - How do we know?
 - Areas for development
- Enabling functions
 - Corporate planning, performance and risk management
 - Financial planning
 - Workforce planning
 - Procurement
 - Assets
 - Digital & Data
 - Democracy & Scrutiny
- Our work with partners
- Our Actions (including progress against previous actions)

The self-assessment report will be scrutinised by the council's Performance and Overview Scrutiny Committee. A draft of the self-assessment report will be made available to Governance and Audit Committee to review the draft report in line with the requirements of the legislation. The self-assessment will be presented for approval at a meeting of full Council.

Evaluation Score: This provides our assessment of performance against the objective using the evaluation scoring mechanism	
Why we focussed on this?	
Why we are focussing on this objective to improve well-being in Monmouthshire.	
How well are we achieving our agreed outcomes?	How do we know?
Row 1 - This sets 'What we want to achieve' from the Community & Corporate Plan 2022-28	
Column 1 - This provides the self-assessment of our performance during 2024/25 based on 'what we want to achieve'	Column 2 - The evidence sources we have used to inform our assessment.
Further areas for development identified through our 2024/25 self-assessment	
These are specific conclusions from the self-assessment that inform our action plan.	

Well-being of Future Generations Act impact				
This provides an explanation of how our activity contributes to the Well-being of Future Generations Act well-being goals and ways of working. It also identifies the council's well-being objective(s) that were set as part of the Community and Corporate Plan in April 2023.				
Measures of progress				
Measure	Previous	Latest	Target for 2024/25	Comment
This provides an update using the measurement framework of the Community and Corporate Plan.	Previous data is 23/24 unless otherwise stated	Latest data is 24/25 unless otherwise stated	This is the target we set for 24/25	Any further explanation on the performance measure

ⁱ This includes both emissions from the council's operations and land-based and supply chain operations

ⁱⁱ Percentage of Year 11 school leavers who are NEET. [Pupil destinations | Careers Wales \(gov.wales\)](#)

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SUBJECT: Performance Assessment of Enabling Strategies 2024/25
MEETING: Performance and Overview Scrutiny Committee
DATE: 15th July 2025
DIVISION/WARDS AFFECTED: All

1 PURPOSE:

- 1.1 To provide the committee with an assessment of performance of the council's enabling strategies during 2024/25. The council's enabling strategies set the direction for the council's assets and resources to the deliver the council's purpose and objectives set in the Community and Corporate Plan. The enabling strategies comprise the Asset Management Strategy, Digital & Data Strategy, Medium Term Financial Strategy, People Strategy and Socially Responsible Procurement Strategy.

2 RECOMMENDATIONS:

- 2.1 That the committee uses the assessment to scrutinise the performance of the council's enabling strategies during 2024/25.

3. KEY ISSUES:

- 3.1 The Community and Corporate Plan sets a clear purpose for Monmouthshire to be a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. This is supported by six well-being objectives. A set of enabling strategies were subsequently developed. The strategies ensure that all the council's assets and resources are aligned behind its core purpose, as set out in the Council's performance framework shown in Appendix 2.
- 3.2 To ensure the efficient and effective delivery of the enabling arrangements, an assessment of the performance of each of the enabling strategies in the last year, 2024/25, has been completed. The assessment has been undertaken alongside the Council's self-assessment process to ensure alignment between the enabling arrangements and delivery of the Council's objectives.
- 3.3 The assessment evaluates the performance of the objectives set within each enabling strategy. It assesses 'How well are we achieving our agreed outcomes' using a range of information to assess progress and impact of this work so far. It sets out 'How do we know' which identifies the evidence that supports the assessment made. It also proposes areas for development that will be a ensure the continued successful implementation of the strategy. The assessment also provides an overall score of progress using the Council's self-assessment framework, set out in appendix 1.
- 3.4 The financial year 2024/25 saw a continuation of numerous wider pressures that are resulting in challenges for many local authorities. Monmouthshire is seeing increasingly complex demand and cost pressures. The aim of the enabling strategies is to support the Council to deliver its Community and Corporate Plan which strives to address complex issues over the long-term and focus on the well-being of current and future generations. The assessment of overall progress for each enabler recognises that most strategies are in their first year of delivery. The assessment based on delivery of activity planned for the first year of their implementation and the effects of some activity may not be clearly demonstrable over short timescales.
- 3.5 Performance and Overview Scrutiny Committee has an important role in scrutinising the council's performance. This report provides the committee with an assessment of performance with the enabling strategies, that the committee can use alongside the Council's annual self-assessment of performance 2024/25, also on the agenda, to inform its role. The committee may also wish to use

both reports to identify any further areas it may want to scrutinise the performance of in more detail as part of its forward work plan or refer to another committees' if the area is within their remit.

4. RESOURCE IMPLICATIONS:

- 4.1 There are no additional resource implications as a result of this report. However, there may be resource implications in undertaking further actions identified in the performance assessment. These would be subject to the usual council decision-making processes.

5. BACKGROUND PAPERS:

Asset Management Strategy 2023-2027

Digital and Data Strategy 2024-2027

Medium Term Financial Strategy 2024-2029

People Strategy 2024-2027

Socially Responsible Procurement Strategy 2023-2028

Community and Corporate Plan 2022-28

Draft Self-assessment Report 2024/25 – separate agenda item

6. AUTHORS:

Asset Management Strategy: Nicholas Keyse, Acting Head of Landlord Services

Digital and Data Strategy: Sian Hayward, Head of Information Security and Technology & Richard Jones, Performance and Data Insight Manager

Medium Term Financial Strategy: Jonathan Davies, Head of Finance

People Strategy: Matthew Gatehouse, Chief Officer People, Performance and Partnerships

Socially Responsible Procurement Strategy: Cath Fallon, Head of Housing, Rural Development and Strategic Partnerships, coordinating input from Ardal, collaborative procurement Service.

Report coordinated by:
Hannah Carter, Performance Analyst
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Appendix 1 – Performance Assessment of Enabling Strategies 2024/25

We have assessed performance against each of our enablers overall using the Council's self-assessment framework, based on a scale of 1-6 using the following principles:

Level	Definition	Description
6	Excellent	Excellent or outstanding – all performance measures have achieved the target set and all actions have been delivered
5	Very Good	Major strengths – a significant majority of actions and measures are on track. No more than one or two falling short
4	Good	Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved
3	Adequate	Strengths just outweigh weaknesses – the evidence of success marginally outweighs areas that are not on track. Some actions are behind schedule and some measures are falling short of planned targets
2	Weak	Important weaknesses – the majority of measures and actions have not been achieved
1	Unsatisfactory	Major weakness – in most areas, performance is assessed as moving in the wrong direction and the vast majority of actions have not been delivered

In addition, progress of each outcome and milestone has been rated Red, Amber or Green (RAG), to indicate progress made under the three categories below:

- **Green:** Progressing Well – Progress made that is meeting timescales and project milestones set; if the action is implemented, there is evidence that the expected impact is being achieved
- **Orange:** Progressing but not on target – Progress made that is behind timescales or project milestones set; if the action is implemented, there is evidence that the expected impact is not being completely achieved
- **Red:** Attention needed – Progress is not being made and timescales or project milestones have been missed, or the action has not been started; if the action is implemented, there is evidence that the expected impact is not being achieved at all

People Strategy - Level 4 Good		
How well are we achieving our agreed outcomes?	How do we know?	RAG
What we want to achieve: A clear purpose, supported by an enabling culture where colleagues have the information they need and are empowered to make a difference to the people we serve.		
We know that people are motivated when they understand, and have a connection to, purpose. We worked with staff to understand what they needed to help them thrive and succeed at work. We used this to develop a People Strategy which sets clear objectives and actions to make sure we deliver this. 89% of colleagues who responded to the staff survey said they understood the authority's purpose and their contribution to it. We held two face-to-face staff conferences in the north and south of the County. This allowed us to bring colleagues together to understand their needs and ensure we are working to a clear shared purpose and objective.	Results of staff survey Staff Q&A Sessions	
What we want to achieve: A workforce with a diverse range of experiences, skills and backgrounds where people can be themselves.		
We have proactively encouraged the development of staff networks. We are also in the process of updating the information we hold about protected characteristics so we can understand where we need to improve and enable us to report disability and ethnicity pay gaps alongside the gender pay gap. 87% of colleagues responding to the survey said they believed the authority promoted an inclusive working environment.	Results of staff survey Gender pay gap report	
What we want to achieve: People can access the training they need to do their job and the development opportunities to take the next step in their career.		
We launched a new e-learning system called Thinqi. This contains the essential learning that people need to do their job and some wider development courses. To date 1,084 colleagues, around 50% of those targeted, have completed all essential learning. 81% of colleagues told us that they have access to the training that is relevant to their job. Staff turnover is presently at 12.2% compared to 17% in the previous year. 75% of people told us that they plan on staying with the council over the next 12 months which is lower than we would like. We have developed a new employee appraisal scheme aligned to a training needs analysis. This has been piloted and will be rolled out in 2025-26 to ensure we understand peoples' development needs and can design our training offer to fit this.	Results of staff survey Staff turnover data Thinqi training data	
What we want to achieve: We are an employer of choice, attracting talent from a wide range of industries with career pathways that enable us to retain the best people.		
Our new careers website and e-recruitment system have been launched. These promote Monmouthshire Council as an employer and the benefits of a career with us as well as providing an improved candidate application process. Our employees and former staff need to be ambassadors for our organisation. 82% of colleagues said they would recommend the council as an employer to friends and family. We need to improve workforce planning to ensure a pipeline of talent and use succession planning to reduce our reliance on key individuals. Our new work experience	Results of staff survey Straw poll of new recruits	

policy and apprentice first approach have been adopted and laid the foundations for the next generation of employees.			
What we want to achieve: Colleagues have access to the resources to manage their own well-being and can access tiered support to help them back to work if they experience sickness related absence.			
We have a wide range of staff benefits in place. These include discounted gym membership, a cycle to work scheme, access to confidential financial support, free counselling sessions and a full occupational health service. The results of our staff survey show that only around six out of ten employees think we do enough in this area. In response, we created a marketplace at the recent staff conference to promote our offer. Benefit providers have each recorded a short piece to camera which we will make available to help promote these benefits. We have also developed a workforce radar and team Q&A sessions to help us identify where problems may be emerging so that we can respond to these at the earliest opportunity.			Results of staff survey Sickness absence data
What we want to achieve: People have the mindset, skills and support needed to develop and implement the solutions, including the use of technology, to the biggest challenges facing the council and the communities we serve.			
We have an incredible workforce who go above and beyond for our communities. While staff are positive about training, only 64% of people say they feel able to make improvements happen in their area of work indicating that we have more to do. We have developed training modules covering several of the tools taught and used on the InFuSe programme. These will be rolled out alongside the change programme. In the meantime, delivery has been focused on essential skills. We are developing proposals to strengthen our digital offer in collaboration with neighbouring authorities.			Results of staff survey
Areas for development			Who and When
Seek feedback to inform how we further embed the e-recruitment system			Chief Officer People Performance & Partnerships – July 2027
Milestones	Progress	Target	Comments
New appraisal scheme launched		July 24	Developed but launch was paused due to capacity being diverted to other projects.
Workforce data is featured in all service business plans and a whole authority dashboard		Sept 24	
New section features in our regular staff newsletter 'The Compass'		Sept 24	
Programme to roll-out the skills and tools taught as part of the InFuSe programme in place		Dec 24	Paused so it can be launched alongside a wider change programme.
Staff survey in place		March 25	

Research concluded and recommendations made on action likely to have greatest success in reducing the gender pay gap in the authority		Sept 25	Initial work did not generate actionable insights. Further research is needed.	
E-learning system launched authority-wide		June 24		
New training space is in place		2025	Development of business case delayed due to other priorities	
New scheme for work experience, apprenticeships and graduate recruitment in place		Dec 24		
New staff benefits page in place		Sept 25		
Culture audit undertaken		March 26		
Measures	Previous	Current	Target	Comments
Percentage of staff receiving an appraisal			To be set in 25/26	Not yet rolled out.
Average difference in pay between employees who are disabled and those who are not (£)			As above	This will be reported for the first time in 2025/26.
Average difference in pay between males and females (£)	1.02	0.85	As above	
i) Mean ii) Median	0.73	0.49		
Percentage of non-teaching workforce accessing courses on Thinqi.	New	50%	As above	
Staff turnover (%)	17.0	12.2	As above	
Expenditure on agency staff	TBC	TBC	As above	
Average number of applicants for each new role	New	New	As above	
Sickness absence (%)	11.9	12.7	As above	

Digital and Data Strategy - Level 3 - Adequate

How well are we achieving our agreed outcomes?

How do we know?

RAG

What we want to achieve: Work with partners to develop and maintain strong foundations to support delivery of the strategic vision

We developed a new Digital and Data Strategy in 2024/25. The foundations for the effective use of digital and data technology have been laid. New data standards provide guidelines which aim to ensure data is reliable, accessible, and actionable. We have implemented and promoted information governance policies, and procedures and reviewed existing data sharing agreement as and when necessary, to ensure robust management of data and systems. We have ensured robust arrangements are in place to safeguard data and systems from cyber-attack via: Physical barriers to the network, staff awareness, training and culture and structured governance, risk analysis and business continuity planning, while recognising that the total elimination of a cyber-attack is not possible.

We have implemented the SharePoint document management system on time and on budget. This has streamlined document management, enhanced security and supported collaboration on information and data, where appropriate to do so. We have implemented a geo-spatial metadata portal and piloted 50 records. This provides information to improve data quality and will help consumers of the data understand and use it. This will be used to inform the development of an authority wide solution.

We have strengthened our governance arrangements by establishing a Strategic Digital and Data Board to guide strategic decision making, prioritisation and accountability for implementing the strategy. A Digital and Data Steering Group is being established and service representatives recruited who can advocate, champion and drive forward the use of digital and data within their service areas and inform the Council's strategic priorities. This will enable priorities to be shaped by service need.

We have not yet undertaken digital and data maturity assessments, due to capacity and resource constraints. This is limiting our understanding of the ability and strengths of the organisation on digital and data and is restricting targeted training and improvements being made.

Data Standards

Information governance and Data Protection Policies and Procedures.

Cyber security arrangements and assurance reports to Governance & Audit Committee.

SharePoint project feedback.

Geospatial meta data catalogue.

Strategic Digital and Data Board & Digital and Data Steering Group

What we want to achieve: Use data analytics and insight, digital advancements and a user-centred focus, to change how the diverse needs of citizens and service users are met

Foundation arrangements have been developed and are being piloted, however we have not yet realised the full potential of digital advancement, data analytics and insight. We have begun the process of transitioning towards a shared service model for digital and data in collaboration with Torfaen County Borough Council and Blaenau Gwent County Borough, as part of an expanded role for the Shared Resource Service (SRS). The authority's digital team will begin working alongside partner organisations at the earliest opportunity and an investment case is being prepared for a modern data service operating across three authorities, being clear where the initial investment is best focused. This will be integral to accelerating the delivery of the aims of the strategy and maximising the potential of digital and data.

Digital, Data & Technology collaboration

Single View Pilot Project

Digital Service Standards

We are working within a Gwent-wide team of partners to pilot a Single View (Master Data Management, MDM) platform which will unlock new potential by providing the possibility of using third party software to link datasets together to provide insight. An initial pilot proof of concept is due to conclude shortly. The learning from this will inform the next steps for this project. This will also guide the development of data sharing opportunities to enhance the level of insight that can be derived.

Every digital intervention and project applies the digital service standards and user centred focus as an integral part of digital service delivery. We have not yet established a user satisfaction mechanism for projects; this will form part of the new collaborative arrangements. We are increasing our use of customer personas when undertaken service design activity to ensure these are based on user need.

We have developed the use of specialist Geographical Information Systems (GIS), for geospatial analysis, by increasing accessibility of data through upgrading the infrastructure and development of new datasets. Ongoing issues with site performance requiring priority fixes and capacity constraints has limited development.

We have re-established our open data approach and offer, to support, where appropriate, the use of our data for transparency and wider civic value. We need to engage with more council services to identify further open data sets that would be beneficial to publish as open data.

We have developed some data insight products to generate insights to inform delivery of the Council's objectives. These include: Improving data sharing to enable the development of a 'workforce radar' that brings together a range of data to provide strategic insight on the workforce internally for Strategic Leadership Team (SLT); Launching and running the national resident survey and analysing responses to provide insights into resident reviews of their local place and council; Updating internal performance data dashboards quarterly to provide insight into the council's performance. Developing and accessing the capability and capacity required to develop and generate more advanced insights and move to more predictive analysis will be an integral part of the Digital, Data and Technology collaboration business case.

MonMaps (Internal) and Local Info (residents) Geographical Information Systems (GIS).

Open Data Offer

Workforce radar

National Resident Survey

Performance data dashboards

What we want to achieve: Equip and empower our citizens, communities and the organisation to get the most out of digital and data technology

Our focus is on delivering collaborative digital, data and technology services to support the delivery of our Community and Corporate Plan. An essential component of this is training in the skills and technology required. We have offered a range of digital and data organisational training internally and through partners. We have established networks with representatives across the council to share practice, provide support and inform digital and data developments. We need to develop our support offer, including training, to ensure it matches the needs and requirements of the organisation now and for the future. This will be informed by the Digital and Data Maturity Assessment.

Digital training

Digital Champions network

System & Data Administrators network

Co-Pilot pilot project

Number of data sets catalogued	New	50	50	
Percentage of Customers who score 3 or above for Customer Satisfaction	New	Not available	80%	Mechanism to be established to report from 2025/26
Number of open data sets published	9	38	20	
Number of digital and data training sessions held.	New	3	20	System and data administrator network sessions, since strategy agreed.
Number of system and data network sessions facilitated.	New	3	8	System and data administrator network sessions, since strategy agreed.

Asset Management Strategy – Level 5 – Very Good

How well are we achieving our agreed outcomes?

How do we know?

RAG

What we want to achieve: Fit for purpose and collaborative estate

Through 24-25 significant investment has been made to enhance the Council's property estate and ensure it remains fit for purpose for our service users and providers.

In Education, new provisions have been created through the completion of the new non-maintained nursery at Trellech Primary School, and completion of the north and south provision for the Pupil Referral Service at Bryn-Y-Cwm in Abergavenny and the former Mounton House School in Chepstow. This has provided the service with a dedicated high-quality environment and setting, with improved access to outdoor space which is conducive to the needs and demands of the pupils they serve.

Through 24-25 post-completion support has continued at the newly constructed Severn View Parc Care Home in Portskewett, which serves as an example of strong collaborative working (between Landlord Services and Social Care) to deliver an exemplar and fit for purpose facility. My Day My Life / Monmouthshire Services have seen completion of new 'bases' at the Melville Theatre in Abergavenny and Overmonnow Family Learning Centre in Monmouth. This has enabled the creation of an enhanced offering to service both areas, including fully compliant changing places within both assets and improved accessibility through the creation of safer drop off zone and accessible motorised doors.

Completion of Bryn-Y-Cwm and Mouton House School for the PRU service.

Severn View Parc handover Feb 24, completion of snagging Feb 2025

Gwent Police continued collaboration and MOU extension

My Day My Life 'base' creation at Melville Theatre and

We continue to ensure compliance with statutory health and safety requirements, with meaningful gains having been made through 2024-25 through strengthening of our property estates asbestos recording and monitoring processes. A roll out of improved documentation and reporting protocol is ongoing and across the entire portfolio through 25-26, including training of duty holders to strengthen their competency. MCC responded quickly and positively to the reinforced autoclaved aerated concrete (RAAC) request, satisfying that no property within the existing portfolio had RAAC present.

Landlord Services continue to work with service areas to identify opportunities to deliver a more collaborative and fit for purpose estate, including opportunities to surrender leased in property that may result in revenue savings to MCC. Social Care's Workforce Development Team have successfully surrendered leased in property and relocated to Innovation House in Magor – making better use of an under-occupied asset and releasing the service from cost obligations relating to third party room hire.

Landlord Services will continue to work with directorates to understand their future accommodation requirements and service pressures.

Overmonnow Family Learning Centre

Property Rationalisation including surrender of leased in property at Mamhilad

What we want to achieve: Good role models for climate and nature practices

Progress continues to be made in MCC's efforts to decarbonise the property portfolio and demonstrate we are good role models for climate and nature practices. MCC Estates continued its promotion of the development of a new solar farm in the Replacement Local Development Plan, which is hoped to replicate the successful operating model that has already been demonstrated at MCC's existing 5MW solar farm at Oak Grove Farm, Caldicot.

A number of new developments have been completed with inclusion of low carbon measures as part of the scheme. This includes the installation of air source heat pumps and renewable technologies as part of retrofit and new build design, including at a Social Care home in Caldicot and agricultural cottage for temporary housing in Caerwent. Consideration continues to be given to any future proofing of property when developing the Council's capital maintenance programme.

Landlord Services have continued to provide client-side technical support for the delivery of the new 3-19 School in Abergavenny – a net-zero development. Improving our built environment through investment in low carbon technologies has continued to feature in our design and development approach, including targeting higher standards of BREEAM performance. EV charging points have been installed at various Council assets, including the new Severn View Care Home and Magor with Undy Community Hub. These installations have supported the expansion of the public electric vehicle network throughout the County.

In the nature and growing sector, three farm holdings have been vacated and re-let through 2024-25, enabling entry level farmers to be accommodated with specific focus on more sustainable farming practices and principles. All three farms are performing well, have demonstrated an ability to diversify their offering and still generate strong commercial

Ongoing technical advisory role for 3-19.

Re-let vacant farm holdings

Promotion through RLDP

Allotment support grant improving 130+ allotment plots.

EV charging at 3 new locations

return for MCC. We continue to support farm tenants to access professional advice on phosphate impact and how to adjust their farming practices to meet developing NRW regulatory changes.

Through the application of Welsh Government's Allotment Support Grant, over 130 allotment plots have been improved, created or revived across 6 different allotment sites throughout Monmouthshire. We are currently developing the 25/26 work planner having successfully been awarded more grant funding to support the delivery. Following a recent marketing period, proposals are being formulated for the creation of a small-scale horticultural offering at the former Green Fingers provision at Melville Theatre, Abergavenny.

What we want to achieve: Maximised and commercialised asset base

MCC continue to identify opportunities to re-let or dispose of vacant or surplus property. In accordance with the changes to the governance arrangements as set out in the Asset Management Strategy, 6 monthly updates have been provided to Performance and Overview Scrutiny Committee on the performance of the commercial and investment portfolios. Through 2024-25, we have reported an improvement in the performance of the Council's two largest acquired investments (Castlegate Business Park and Newport Leisure Park), with Newport Leisure Park scheduled to return to an Over 2% Return on Investment (ROI) in 25-26. Castlegate BP has developed a co-working and flexible room hire initiative called 'MonSpace' which has generated more than £61,000 in rental to MCC since its launch. The combined net income from both assets for 24/25 was £173,874. In 24/25, there has been a steady increase in the number of skilled employed roles within our investment portfolio, as well as high and improving occupancy rates.

Within the wider estate, opportunities to reduce running costs and generate additional revenue continue to be pursued. In June 2024 MCC completed the letting of underutilised office space at Usk County Hall to the SRS service. Vacant and dilapidated space at the former Mounton House School has been advertised for sale and an offer accepted. All lettings continue to explore opportunities to generate financial return alongside social and economic community benefits. Properties such as the former Abergavenny Library and vacant space at Monmouth Market Hall have been let in accordance with those objectives.

Further work will be done to continue to let vacant space or development opportunities, including Phase 3 of the allocated development site in Rockfield Farm, Undy which continues to be advertised and will generate a capital receipt. Working closely with colleagues in Employment, Economy and Skills will continue to better optimise the opportunities to draw inward investment into the County.

MonSpace initiative at
Castlegate Business Park

Improved ROI at Newport
Leisure Park

Monmouth Market Hall letting

County Hall letting to SRS

What we want to achieve: Strengthen the enablement role of Landlord Services

MCC Landlord Services (Estates and Property Services) continue to support the delivery plans for various directorates across the Council. In Social Care, the development of the children's residential and 16+ supported accommodation placements continue to be facilitated by Landlord Services, inclusive of the acquisition, refurbishment and ongoing maintenance of properties in Caldicot, Monmouth and Abergavenny.

In 24/25 we have continued to enable the delivery of Housing's Rapid Rehousing objectives, with the acquisition of property in Abergavenny and Usk to assist with the provision of improved homelessness accommodation and repurposing of existing MCC property to service this need. Refurbishment and change of use of the former Severn View Residential Care Home in Chepstow will contribute to these objectives, reducing the reliance on private landowners and therefore delivering a revenue saving. Land at Caldicot Comprehensive School was sold to Monmouthshire Housing Association to enable the development of a 100% affordable housing scheme, with development scheduled to commence in 25/26.

Progress has been made in the effort to improve the customer experience for external and internal clients when accessing our Property Services maintenance and design functions. Regular performance management meetings are taking place with our framework contractors, and in 24/25 the mechanical, electrical and cyclical maintenance frameworks were repurchased. This should offer clients comfort that best value and professional competency is being provided when accessing our services and support. Implementation of a new time sheet system has ensured better live data to inform those paying for services.

Landlord Services continue to support the acquisition and delivery of various development projects across the county, including the acquisition of land to service Active Travel routes in Monmouth and Abergavenny, the construction of the 3-19 school, and development of the Severn View Park Care Home. We will continue to support services moving through 25-26 and beyond.

What we want to achieve: Utilise community assets to optimise social value

In 24/25 progress has been made to secure the future of several important Community assets throughout the county. Drill Hall in Chepstow has completed its lease renewal, securing their occupation at least until 2045. The Bridges Centre in Monmouth are in advanced negotiation for a renewal of their lease, and a business case is being developed by the Melville Centre in Abergavenny to secure a long-term lease for the property. All of these renewals are being undertaken in accordance with the Council's respective supporting policies including the Community Asset Transfer policy and Rental Concessionary Policy. Securing these agreements will offer parity and equity in the way that MCC continues to support their community assets and tenants.

Active Travel acquisitions

Procurement of mechanical and electrical frameworks

Disposal of land for 100% affordable housing development

MDML new bases in Abergavenny and Monmouth

Acquisition of property to support Rapid Rehousing Strategy

Children Services acquisitions and refurbishments

MUCH handover and completion.

Rolls Hall Chepstow Renewal

Tudor Street / The Gathering

Raglan Old School and MUGA

The Magor and Undy Community Hub continues to operate via lease to the MUCH group, a local group facilitating access to much needed leisure and multi-use space within Magor. The importance of MCC's community assets and their role is delivering social value is reflected in long standing negotiations with Raglan Community Council and proposed Community Asset Transfer of the local MUGA. This will enable enhancement of the leisure facilities available in Raglan through access to additional grant funding and more localised management.

At Tudor Street in Abergavenny, a 12-month licence was granted to The Gathering to support their ambitions to establish a new collaborative and accessible facility that will support with the well-being of people with disabilities, mental health issues and additional needs. In 25/26, MCC will continue their schedule of community lease renewals in accordance with lease anniversaries and prospective expiries.

Areas for development

The core behaviours and objectives of the Asset Management Strategy are unchanged but as project's complete the Asset Management Plan or Delivery Plan evolves.

Whilst good progress has been made to strengthen the enablement role and governance arrangements around Landlord Services and use of Council assets, further work will be done to develop individual Service Asset Plans such that more proactive planning on the potential for assets and developing service requirements can be forecast. Service Asset Working Groups will be established for each directorate to inform the development of the capital maintenance budget. We will continue to work with directorates to determine whether the spaces they occupy remain fit for purpose, in the right places, accessible and best meeting current and future service needs.

Further efficiencies in the reporting of property information can be achieved through design, procurement and implementation of a new asset management system. This will enable clearer strategic planning with an evolving asset base. Capital funding has been secured for the implementation of the system and procurement of the new system is ongoing.

Review and application of the Council's Rental Concessionary Policy will continue, as more leases reach their expiry and require renewal. We will continue to identify worst performing assets from an energy and revenue perspective to consider the requirement future investment or potential alternative uses.

Who and When

Acting Head of Landlord Services

Milestones	Progress	Target	Comments
King Henry VIII 3-19 School development		Feb 24	Phase 1 completed.
Severn View Parc Care home development		Feb 24	Completed.

Affordable housing development of land at Caldicot Comprehensive School		July 24	Awaiting commencement of development. Commencement delayed due to retendering of construction project.	
Measures	Previous	Current	Target	Comments
Total income target for the investment portfolio	£1,076,230	£1,170,184	£979,698	
No, of affordable homes granted planning consent on MCC land	46	30	50% AH on all dev sites	No housing development scheduled for 24/25
ROI of Investment Portfolio, as per Asset Investment Policy	-2.08% and 1.41%	-1.81% and 1.44%	2%	Castlegate Business Park and Newport Leisure Park
Average DEC Rating of Operational Estate	D (82)	D (82)	C (51-75)	No change due to delays in second phase of Re:Fit. Improvements projected 25/26
Design/Maintenance Income Target	£1,280,081	£1,216,606	On budget	
Cemeteries net income target	£246,009	£230,267	£183,041	
Industrial units net income target	£213,535	£233,876	£188,275	
County Farms net income target	£269,120	£274,012	£269,120	
% of rental arrears from investment portfolio's total income	4.8%	2%	2%	

Socially Responsible Procurement Strategy – Level 3 - Adequate		
How well are we achieving our agreed outcomes?	How do we know?	RAG
What we want to achieve: Contribute to reducing the Council's carbon emissions to Net Zero by 2030		
Since 2023 Spend Dashboards have been available in PowerBI, providing each Directorate with the ability to review their spend data, including 'their' carbon footprint and identify their high carbon contracts. It also allows the carbon footprint for key procurement spend categories to be analysed quarterly.	The Council understands the carbon impact of the supplies, services and works it buys and takes active steps	

- Council became a Deforestation Free Champion Council and signed up to Size of Wales Deforestation Free Charter in December 2024. Work continues to across the council to expand the deforestation free work, share learning with other schools and look at other deforestation risk procurement products that the council may be buying.
- Senior Strategy Officer (Carbon) started work in March 2025, they will be driving forward the carbon reduction agenda across Ardal Councils.
- An Ardal/WRAP carbon reduction workshop programme for 2024/25, supported by Innovate UK funding.
- Worked through the Southeast Wales (SEW) Procurement Network to progress Carbon Reduction Workstream, including consulting with Business Wales on development of their Carbon Reduction Reporting Tool and WLGA in shaping their latest Carbon Reduction Guidance, piloting WG Energy Service Carbon Reduction Tool.

to reduce their carbon footprint.

- Decision to become a [Deforestation Free Champion Council](#)

What we want to achieve: Making procurement spend more accessible to local small businesses and the third sector

- Updated Contract Procedure Rules encourage Directorates 'where the market allows' to provide opportunities to local businesses for below Procurement Act Thresholds through targeted invitations to bid.
- Buying Responsibly Guides updated and launched on the Ardal website which clearly set out the four procurement routes for all contract values. Training and support have been put in place to assist.
- The development of the Contract Forward Plan for tenders above £75K will be aligned to an ongoing communication campaign to publicise opportunities to local businesses.
- Two Contract Procedure Rules training videos have been developed and are available on the Council website.
- Revised 'Selling to the Council' guides have been produced, 'Meet the Buyer' events are being scheduled, social media will be used to promote low value opportunities and highlight support available from Business Wales.
- As part of the response to the new Procurement Act, we have simplified the quotation processes for low value opportunities and introduced a digital form for service areas to record their quotation process / outcomes.
- Carbon Animation developed for launch June/July 2025.

- Increasing the proportion of Council spend that is local and equitable.
- Increasing the number of local businesses and third sector organisations accessing and bidding for Council opportunities
- Report on the percentage of spend with Local Suppliers

What we want to achieve: Improving Fair Work, Equity and Safeguarding practices adopted by suppliers

- Modern Slavery Statement incorporated within the Corporate Safeguarding Policy and will be reviewed every two years, in line with the Corporate Safeguarding Policy review timescales and will be uploaded to Monmouthshire Hub for ease of access. Training is also available to staff via Thinqui.
- Real Living Wage – Cynnal Cymru are in discussion with the Council to look at progressing accreditation in 2025.
- The draft Socially Responsible Procurement Policy, which is scheduled for adoption in summer of 2025, sets out the Council's position in relation to "Fair Work Practices" and what it expects of its contractors.
- Suppliers are encouraged to sign up to the Code of Practice: Ethical Employment in Supply Chains
- The Exploitation Protocol document is currently under review by the Safeguarding Team as part of the Safeguarding Business Development Plan and will be completed by August 2025. It will then be reviewed on a bi-annual review schedule.

- Delivering against the Social Partnership and Public Procurement Act and the principles of the Code of Practice: Ethical Employment in Supply Chains.

What we want to achieve: Increasing Community Benefits

- | | |
|--|---|
| <ul style="list-style-type: none"> • Building on the learning from the Cardiff Council Community Well-being Benefits (CWB) Programme the use of the Welsh Themes, Outcomes and Measures (TOMS) and standards MCC CWB documentation was developed and piloted on 3 MCC Projects in 2024/25 with contractors committing to delivering just over £113,000 of CWB with over £11,000 delivered to date • The new Thrive Management and Monitoring system was implemented in early 2025, and this is more user friendly for officers and contractors. Monthly THRIVE training is available for contractors, and this is also offered to Council contract managers. • Ardal Community Well-being Benefits Guidance and standard tender documentation has been developed. • Tailored support provided to contractors to assist them to delivery their TOMs commitments and develop case studies. | <ul style="list-style-type: none"> • Increasing the number of tenders that ask for community well-being benefits / social value commitments. • Increasing the volume and value of community well-being benefits / social value committed to and delivered through Council contracts. • Tracking the type, and range of communities and/or interest groups benefitting from community benefits and/or social value delivered through our contracts. This will be the responsibility of contract managers. |
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What we want to achieve: Securing value for money and managing demand

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|---|--|
| <ul style="list-style-type: none"> • The Procurement Team use the Ardal Councils Contract Forward Plans to look for opportunities to create better economies of scale given the potential aggregate spend. • Buying Responsibly Guidance launched on Ardal website in June 2024 and updated in February 2025 to reflect new Procurement Act. Training on the Council's four Procurement Routes is available on the Council website via two 5-minute Contract Procedure Rules videos. • A new and revised Contract Forward Plan has been developed to mirror the requirements of the Procurement Act and the requirement to publish a Pipeline Notice of all current and future public contract opportunities over £2M. The Pipeline will be published once UK/Welsh Government online Pipeline Tool is functional. • Compliance with the Council's Contract Procedure Rules is reviewed as part of the scope of each Internal Audit review which covers both corporate areas and Schools. These reviews seek a balanced, independent view of the internal controls, how Officers are seeking to achieve value for money and the level of compliance which is in place. Any issues highlighted are reported through management, the Senior Leadership Team and the Governance & Audit Committee as appropriate. The Internal Audit team are pro-active in offering advice and will continue to | <ul style="list-style-type: none"> • Reporting on our contract register and spend under management. • Managing our Contract Forward Plan and publishing it on quarterly basis • |
|---|--|

consult with both the Strategic Procurement Lead (once appointed) and Ardal to improve the Councils level of compliance.	
What we want to achieve: Ensuring legal compliance and robust and transparent governance	
• The Procurement Team have worked with Legal & Internal Audit to develop updated Contract Procedure Rules that reflect the new legislative requirements of the Procurement Act. The Procurement Team have also worked with all Ardal Councils to standardise the core elements of the CPRs across all Ardal Councils. • Digital governance forms including Pre-Tender and Contract Award Reports have been developed and rolled out across all Ardal Councils for all tenders in excess of £75,000 to promote transparency. This ensures that all tenders are challenged and that consideration for Community Well-being Benefits (CWB)/Social Value, safeguarding, fair work, carbon reduction and localism are where appropriate delivered as part of the award of contract. • Digital Quotation Record Form used for below £75,000 quotations. • Knowledge Drop Procurement Act Training sessions were held in the summer of 2024 and were attended by 64 Monmouthshire Council staff and over 350 Ardal Council staff. • Contract Procedure Rules training has been developed and rolled out across all Ardal Councils – this is in the form of two 5-minute videos and available through the Council website. • Contract Register developed ready for publication in 2025/26. • Quarterly Procurement Spend Reports continue to be published on PowerBI and have been made available to around 10 MCC officers to date but can be rolled out further.	• Publishing an annual Procurement Report from 2026.
What we want to achieve: Promoting innovative and best practice solutions	
• The development of more definitive Contract Forward Plans allows greater dedicated time for procurement professionals to consult with operational technical leads to discuss options and undertake soft market testing if there is an opportunity for innovation. • Ardal won Welsh Procurement Team of the Year at the GO Awards and the overall Excellence Award. • The Procurement Team continues to have a strong working relationship with all the local universities, regularly engaging in discussion on key procurement issues and exploring how the Council can continue to be at the forefront of public sector procurement. •	• Reporting and developing case studies to highlight best practice. • Identifying and reporting on procurement contributions to new ways of delivering improved services and products
Areas for development	Who and When
• Developing and implementing a suite of carbon reduction metrics including piloting of CO2 reporting tools. • Developing a support programme from WRAP Cymru 2025/26 to support capability and capacity building • Strengthening strategic links with Monmouthshire's Economy, Employment and Skills team and Ardal to develop a programme of awareness raising activities for local businesses. • Ensure that Socially Responsible Procurement Policy is finalised and adopted.	Ardal/MCC – 2025/26 Ardal/WRAP – 2025/26 Ardal/MCC Employment and Skills team – on going. Ardal/MCC on going. Ardal/MCC Safeguarding – on going.

- Explore the adoption of Ardal's Safeguarding Policy for Contractors within MCC and supporting Guidance for officers.
- Review Modern Slavery Statement and publish updated statement annually in April.
- Assess potential to adopt Cardiff's Procurement Safeguarding Assessment Guide to support both Directorates and the Procurement Team to ensure that Safeguarding is included within tenders and contracts are managed in a consistent way that is proportionate to the risk. This can be amended and be available to roll out in MCC and the wider Ardal partners.
- Contract Forward Plan to be used to identify contracts where CWB (Community Wellbeing Benefits) can be delivered.
- Review of Contract Management to be undertaken across all Ardal Councils in 2025/26
- Monmouthshire's Adult Employment and Skills Team are working closely with Ardal's CWB team following the award of tenders to ensure the appropriateness and delivery of the associated community benefits and to avoid duplication and double counting.
- Once appointed the Strategic Procurement Lead will establish a Procurement Network, which will include the Adult Employment and Skills Lead who will provide support and advice to colleagues, in terms of including and monitoring community benefits in procurement contracts. A Thinqi training module will also be developed.
- Undertake a half year review of Community Well-being Benefits programme and reporting through Thrive and
- Look to include more MCC specific case studies in the Ardal Community Well-being Newsletter
- Category Management Teams to use Contract Forward Plan to initiate discussions with Directorates to identify efficiencies and opportunities to innovate.
- Develop a draft template for the Ardal Annual Procurement Report for use in 2026.
- Produce Procurement Performance Reports for SLT every six months timing to align across Ardal partners.
- Report to MCC Performance and Overview Committee on an annual basis.
- Consideration of the benefits of pre-procurement Member Scrutiny, whether explicitly required by the constitution or not.
- Ensure Ardal Procurement Team are members of working groups developing new Welsh Government Policy and/or Guidance.

Ardal/MCC Safeguarding – on going
Ardal/MCC Safeguarding – 2025/26

Ardal on going.

Ardal / MCC – 2025/26.

Ardal/ MCC Employment and Skills team – on going.

MCC Strategic Procurement Lead – on going.

MCC Strategic Procurement Lead/ MCC Employment and Skills team 2025

Ardal – 2025

Ardal/MCC Employment and Skills Team – 2025

Ardal – 2025

Ardal – on going.

Ardal/MCC – on going.

Ardal – 2025/26

Ardal/MCC – on going.

Ardal/MCC – on going.

Measures	Previous	Current	Target	Comments
No. of Contracts awarded with Carbon Reduction Plans	New	-	2025/26 target to be set in collaborati	To be collected from 2025/26

			on with Ardal partners	
Percentage of spend with local business	New	17%	As above	
Percentage of spend in Southeast Wales	New	62%	As above	
Percentage of spend in Wales	New	67%	As above	
Percentage of spend with SME	New	44%	As above	
Percentage of spend with Third Sector	New	6%	As above	
The number of accredited real Living Wage employers	New	-	As above	To be collected from 2025/26
Number of workers employed by an accredited real Living Wage employer	New	-	As above	To be collected from 2025/26
The number of workers employed by an accredited real Living Wage employer receiving a pay rise onto at least the real Living Wage	New	-	As above	To be collected from 2025/26
Additional money going into the local economy as a result of uplifts to the real Living Wage	New	-	As above	To be collected from 2025/26
Community Wellbeing Benefits Committed and Delivered (during FY and total) (£)	New	£113,468 (Committed)	As above	
Employment / Jobs (number and days worked)	New	-	As above	To be collected from 2025/26
Apprenticeship (number and weeks worked)	New	-	As above	To be collected from 2025/26
Work Placement (number and weeks worked)	New	-	As above	To be collected from 2025/26
Number and value of Pre Tender Reports processed during the year	New	-	As above	To be collected from 2025/26
Number and value of Contracts Awarded during the year	New	-	As above	To be collected from 2025/26
Number / percentage of exceptions based on spend (compliance)	New	-	As above	To be collected from 2025/26

How well are we achieving our agreed outcomes?		How do we know?	RAG
What we want to achieve: Develop and deliver a programme of change			
The Council's programme of change is currently embedded within the work cycle of the Senior Leadership Team (SLT) and is being developed in parallel with the forthcoming update to the Medium Term Financial Plan (MTFP). Initial programme mapping and the design of target operating models have been tested, with ongoing work focused on refining the structure and detail that will underpin these models. The outcomes of this programme will directly inform the 2026/27 budget-setting process and will be incorporated into future iterations of the MTFP through periodic updates.		Balanced medium term financial plan Delivery of the Community and Corporate Plan within financially sustainable budget Financial strength indicators	
What we want to achieve: Deliver an improved budget holder training offer across the organisation			
A structured financial training programme for staff is currently under development and will be delivered via the Thingi platform. While progress is ongoing, the prioritisation of budget monitoring and year-end accounts closure by senior finance staff has resulted in a slight delay from the original schedule.		Rollout of training across staff via platform	
What we want to achieve: Continuous review and self-assessment of systems to ensure compliance with policy and regulation			
This objective is multi-faceted and includes: • self-assessment against best practice • the potential for an independent financial resilience review • the maintenance of financial risk registers, • balance sheet strength review • maintaining up to date financial regulations and standing orders. The majority of these were more medium-term objectives and will be considered in due course. The financial risk registers are regularly maintained and monitored and feed into the various updates provided to committee on a periodic basis		Report documents Internal risk registers Internal policy documents	
What we want to achieve: A sound understanding of financial risks, future pressures and cost drivers			

This includes: • Enhancing the approach to modelling future growth, demand, demographic and inflationary pressures in the MTFP. • Dataset of cost drivers to be established and monitored • Revenue reserves (including school balances) and useable capital receipt review to be undertaken in line with the revised reserves policy Significant work has been undertaken to improve the sophistication and reliability of the data that informs the annual budget cycle and periodic updates to the Council's MTFP. The initial focus has been on the most volatile, demand-led, and high-risk budget areas. This has enabled the identification and monitoring of key cost drivers, which now serve as an evidence base for future financial planning. This approach has also supported targeted investment in preventative measures and interventions aimed at mitigating rising demand and cost pressures over the medium term. Ongoing collaboration at both regional and all-Wales levels is contributing to the enhancement of data quality feeding into national statistical frameworks. These efforts aim to improve the accuracy of funding assessments for local government and highlight disparities in need across local authorities due to varying local factors.	Less volatility within annual budget cycles Medium term financial planning that matches resources with desired outcomes of the Community and Corporate Plan
Areas for development	Who and When
Programme of Change • Detailed Implementation Planning: Further refinement of the target operating models into actionable delivery plans with clear milestones and ownership. • Change Management Capacity: Strengthen internal capacity to manage and sustain change, including communications, stakeholder engagement, and benefits tracking. Integration with Service Planning: Ensure alignment between the programme of change and individual service plans to embed transformation across the organisation.	Cabinet/SLT – to feed into 2026/27 budget cycle
Budget Holder Training • Timely Rollout: Accelerate the finalisation and deployment of the training programme to avoid further delays. • Training Evaluation Framework: Develop mechanisms to assess the effectiveness and impact of training on financial management practices. • Ongoing Learning Pathways: Establish continuous learning opportunities and refresher modules to maintain and build financial capability over time.	Head of finance – Autumn 2025

Systems Review and Compliance - Formalise Self-Assessment Framework: Introduce a structured self-assessment tool aligned with best practice standards. - Independent Review Planning: Scope and schedule an independent financial resilience review to provide external assurance. Policy and Regulation Updates: Prioritise the review and update of financial regulations and standing orders to ensure they remain current and fit for purpose.	S151 Officer / Head of Finance – March 2026
Financial Risk and Cost Driver Analysis - Broader Cost Driver Coverage: Expand the dataset to include less volatile but strategically important areas to build a more comprehensive financial risk profile. - Scenario Planning: Enhance modelling capabilities to include multi-scenario forecasting for better preparedness. Data Governance and Quality: Strengthen data governance arrangements to ensure consistency, accuracy, and timeliness of financial data inputs.	Head of finance – Ongoing as part of MTFP updates and budgetary cycle

Milestones	Progress	Target	Comments
Set a legal and balanced budget within the statutory deadline every year		Before 11 th March	Completed
Draft MCC annual accounts presented to Audit Wales by statutory deadline		30 th June	On target
Audited annual accounts approved and signed by statutory deadline		30 th November	On target
Medium-term financial plan update provided on a six-monthly basis		Six-monthly	On target

Measures	Current	Target	Comments
Revenue budget outturn, subject to any agreed budget recovery plan	£497k under spend	Balanced	
Use of one-off revenues reserves to meet recurrent costs	Nil	Nil	
Council Fund balance at or above 5% of net revenue expenditure budget	>5%	>5%	
Minimum useable capital receipts reserve balance	£6.1m	£2m	
% of capital financing costs to net revenue budget	6.3%	<7%	

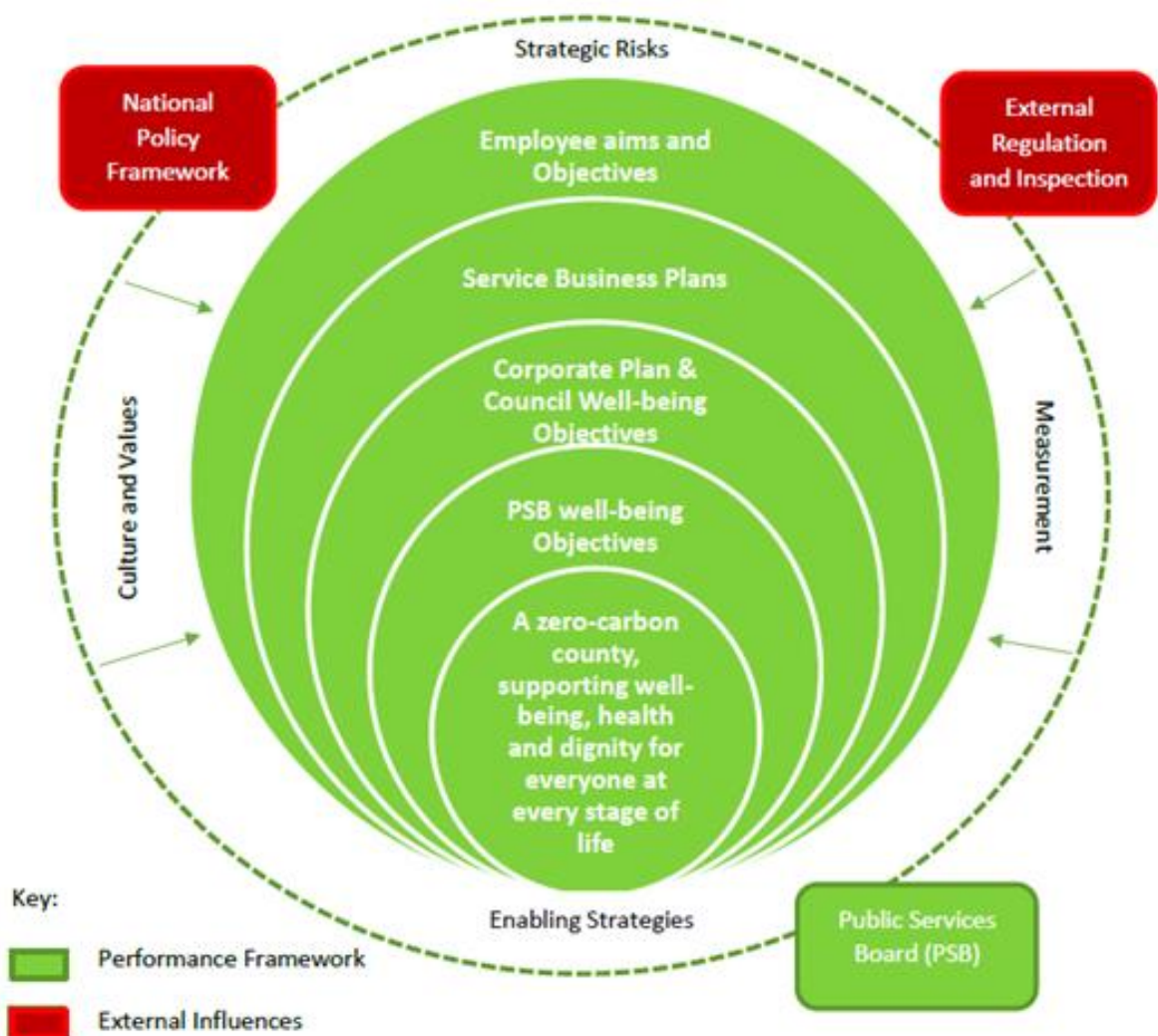
Net asset ratio (current assets: current liabilities)	0.62	>1	Reflective of internal borrowing approach where treasury investments are kept at minimal level
Cumulative school balances	£4.1m deficit	>nil	Budget recovery plans in place with schools registering deficits, but recovery expected to be over a longer period of time
Number of schools in deficit	15	Nil	As above
Delivery of planned revenue budget savings	81.6%	>90%	
% net return on commercial property investments	0.04%	2%	Bad debt provisions have significantly impacted 2024/25 performance (1.06% without these)
In-year council tax collection rate	TBC	97%	
Long term council tax collection rate	TBC	99%	
Percentage of sundry debt over 30 days	TBC	<=35%	
Average number of days sundry debt is outstanding	TBC	<=30days	

Appendix 2

Performance Management Framework

Our performance management framework makes sure that everyone is pulling in the same direction to deliver real and tangible outcomes.

Building a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life is the unifying purpose of the diverse range of services for which we are responsible. We are a partner in the Public Service Board, which is responsible for setting well-being objectives for the county. The council's own well-being objectives are set by Council and form the backbone of our Community and Corporate Plan. Each of our teams has a service business plan that aligns to these objectives. We have a range of performance measures that we use to keep track of our progress. Our risk management policy enables us to manage strategic risks to our delivery. Our employee aims and objectives show the contributions that individual colleagues make to these objectives and delivering our vision in accordance with our values.



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SUBJECT: FINANCIAL UPDATE REPORT
MEETING: PERFORMANCE & OVERVIEW SCRUTINY COMMITTEE
DATE: 15th July 2025
DIVISION/WARDS AFFECTED: ALL

1. PURPOSE:

- 1.1 To provide Cabinet with information on the Authority's final financial results for the 2024/25 financial year in respect of the revenue budget, capital programme, and associated reserves position.
- 1.2 To update Cabinet on the early indicative progress against the 2025/26 revenue budget.

RECOMMENDATIONS TO PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE

- i. That the Performance and Overview Scrutiny Committee scrutinise the results for the 2024/25 financial year in respect of the revenue budget, capital programme, and associated reserves position, and early indicative progress against the 2025/26 budget;
- ii. That the Committee as part of their role assesses whether effective budget monitoring is in place; the extent to which budgets are spent within the agreed budget and policy framework, including the reasonableness of the explanation for variances and; consider the achievement of progress in meeting budget savings targets.

2. RECOMMENDATIONS (to Cabinet):

That Cabinet *recognises*:

- 2.1 A **gross revenue budget surplus at outturn of £1,239,000** prior to transfers to reserves, representing a 0.6% variance against the budget.

- 2.2 After accounting for approved transfers to/from earmarked reserves of £742,000, the final net surplus stands at £497,000, which will be added to the Council Fund.
- 2.3 The surplus reflects a significant improvement of £2.83 million compared to the previous financial update. This positive variance is largely due to an unbudgeted grant of £1.19 million from the Welsh Government in March 2025, alongside favourable service budget positions resulting from effective budget recovery actions.
- 2.4 The Council's continued financial discipline, combined with late grant funding has enabled the replenishment of reserves in line with the Medium Term Financial Strategy.
- 2.5 Despite the positive outturn, significant cost pressures remain in **Social Care, Additional Learning Needs, Waste, Passenger Transport, and Homelessness/Housing**, with a combined overspend reported for the year of **£4.6 million**. While some of these were addressed in the 2025/26 budget, these areas continue to pose financial risks.
- 2.6 An increase in school reserve deficits of **£3.19 million** during the year, resulting in a cumulative year-end deficit of **£4.09 million**. Fifteen schools were in a deficit balance at year-end. Several schools continue to face structural budget challenges, which are being addressed through recovery plans.
- 2.7 Total capital expenditure for the year was **£48.81 million**, with a gross underspend of **£2.73 million**, primarily due to underspends in Infrastructure and Property Maintenance and the receipt of additional unbudgeted grants that have offset core budgets.
- 2.8 Capital slippage requests total **£25.03 million**, which includes **£1.3 million** that can be allocated out of the underspend achieved and will be re-purposed to create a **capital contingency budget** for 2025/26 to mitigate scheme risks or address emerging capital priorities.
- 2.9 There are early indications of cost pressures against the 2025/26 revenue budget, exceeding the **£850,000 contingency** held. Prompt mitigation by services will be required to ensure a balanced outturn position is achieved.
- 2.10 That Cabinet **approves:**
- The strategy to **replenish reserves** as outlined in Section 7, including the allocation of the **£497,000 year-end surplus** to the Council Fund.

- The use of **£3.68 million in capital receipts** to fund eligible revenue expenditure under the Welsh Government’s “flexible use of capital receipts” direction (**Appendix 3**).
- The **capital slippage requests** of **£25.03 million** (Appendix 1 - Section 4), acknowledging the factors that delayed project delivery.
- The **capital budget revisions** detailed in Appendix 5, reflecting finalised grant funding awards for the year.

KEY ISSUES

3 Revenue outturn position

- 3.1 The 2024/25 financial year has seen the continuation of financial headwinds which are impacting upon the Council’s service operating environment:
- The wider socio-economic landscape and cost of living challenges continue to have an impact on our communities, with a consequential increase in demand for Council services, and impact upon income generating services. This particularly impacts the service areas of Children’s Social care, Adult social care, Homelessness, and Children’s additional learning needs.
 - Wider public sector challenges continue to impact upon Council services, notably within Health where efforts to improve patient pathways impact upon the level and complexity of demand for Social care;
 - Whilst headline inflation has fallen, some discrete areas of Council services continue to experience cost pressures on supplies and services, alongside supply chain issues.
 - In continuing efforts to combat inflation, interest rates have remained high, with revised forecasts suggesting that they will remain higher for longer than anticipated at the time of setting the budget;
 - The Council continues to deal with a shortage of staff resources in some areas.
- 3.2 The first two financial updates received by Cabinet in October and December indicated significant pressure on the Councils budget of between £3m and £4m. Cabinet subsequently endorsed mitigating action to develop a structured approach to tackling the forecast deficit through a range of budget recovery measures.

- 3.3 These included a targeted vacancy freeze, maximising the use of grants and income to support core expenditure, bearing down on all non-essential spend, and identifying eligible capital related costs that could be met from capital funding.
- 3.4 In February 2025 Cabinet received the third financial update for the year outlining a reduced forecast deficit of £1.593 million. This was reflective of favourable movements within the majority of service budget areas, where successful budget recovery action and additional grant income had been notified.
- 3.5 At outturn, the Council has successfully mitigated the overall cost pressures through these ongoing targeted actions, and through additional unbudgeted grants and contributions. This has culminated in a gross expenditure budget surplus of £1.239 million prior to transfers to reserves, representing a 0.6% variance against the approved budget.
- 3.6 The final budget outturn position is a significant improvement of £2.83 million since the previous forecast at financial update 3 where a budget deficit of £1,593,000 was anticipated.
- 3.7 The majority of directorates have experienced improvements in positions which is due to five main factors:
- Additional grant funding being secured, or services maximising core revenue costs being met from both revenue and capital grant funding;
 - Staff vacancies continuing to be held as part of budget recovery action;
 - Increased external income from rents, fees and memberships;
 - Identifying additional costs eligible to be met from capitalisation direction to maximise its use;
 - Net borrowing costs remained lower than expected as cash balances remained higher for longer than expected, and longer term loans were secured at competitive rates.
- 3.8 Whilst the final revenue outturn shows a marked improvement, it is important to recognise that over £3 million of this is due to one-off unbudgeted grant funding received from the Welsh Government during the year. This funding has temporarily alleviated service pressures, many of which persist and will continue to pose challenges during 2025/26.
- 3.9 The below summary outlines the service variances both positive and negative that make up the final outturn position:

Table 1: 2024/25 Revenue budget outturn

Directorate	Over / (Under) Spend (£,000s)	% Variance to budget	Over spend	Under spend
Social Care, Health & Safeguarding	3,345	4.9%	Children's services £2,392k - increasing complexity of needs, placement shortages, recruitment challenges	Support services £120k - Staff vacancies and grant
			Adults services £1,358k - increasing complexity of cases, rising cost of care, increasing residential placements, savings not fully realised	Public protection £284k - Staff vacancies
Children, Learning, Skills & Economy	(26)	0.0%	Central budgets £138k – Various over spends relating to school related costs that are required to be funded centrally	Economy, Employment & Skills £164k – Grant income and supplies and services reduction
Infrastructure & Place	503	1.9%	Passenger transport £555k - Demand, contract hand backs	Enterprise management £339k (Senior officer savings, increased grant)
			Waste £399k - Recyclate contract volatility, reduced income	Decarbonisation £240k – Staff vacancies, renewable energy savings
			Housing/Homelessness £342k - maintenance increase for leased accommodation, shortfall in savings from Severn View	Highway external works £136k - increased income
			Building Control £76k - fee income reduction, change in regulatory requirements	Highways Design & Road Safety £120k – staff vacancies
			Solar farm £69k - Weather & grid outage	Highways Development & flooding £126k – additional fee income
			Corporate Mileage savings £100k – Shortfall in saving target	Schools catering £156k (Grant and staff vacancies)
			Planning & Development Control £80k – reduced applications impacting income	
Customer, Culture and Wellbeing	(677)	-8.3%	Attractions £62k – reduced visitor numbers	Leisure, Youth & Outdoor £437k – increased memberships and grant income
			Museums £44k – delayed staff savings	

Directorate	Over / (Under) Spend (£,000s)	% Variance to budget	Over spend	Under spend
				Countryside and Culture £92k – additional grant income
				Communications £97k – strategic allocation of costs into available grant streams
				Markets £154k – increased income and reduced overheads
People, Performance and Partnerships	(80)	-2.3%		Policy/Partnerships £74k - staff savings, ability to passport expenditure to capitalisation directive
Law & Governance	18	0.7%	Committee & Elections £15k – Vat adjustment resulting from changes in how election grant costs are recovered.	
Resources	(132)	-1.5%	Newport leisure park £126k - Surplus generated of £220k fell short of the £346k target due to changes in tenancy agreements and periods of rental concessions.	Revenues, Systems & Exchequer £107k – staff vacancies and grant income
			Castlegate £415k - Increased site maintenance and service charges for vacant units, £367,000 doubtful debt provisions.	Finance/Audit £207k - staff vacancies
			County Farms & Industrial units £138k – reduced income, one-off water rate charges, void costs	Building cleaning & Public conveniences £114k – increased income, rate reductions and staff vacancies
				Landlord services £208k - staff vacancies
Corporate costs	(3,491)	-11.7%	Pension strain costs £209k – enhancements to pension contributions where employees have accessed pension benefits earlier than normal pension age.	Business rate refunds £61k - following appeal
				Insurance £298k – Estimates of the costs for unsettled insurance claims lower than anticipated.

Directorate	Over / (Under) Spend (£,000s)	% Variance to budget	Over spend	Under spend
				Un-hypothecated grant income £3,354k – Welsh Government grants received towards the end of the year to support local government cost pressures.
Capital financing & Reserves	258	-6.1%	Earmarked reserves £895k – Year-end decisions to make contributions to/from earmarked reserves that were not budgeted	Lower net borrowing costs £641k - reflective of higher than anticipated cash balances, forward starting loans, and significant capital slippage.
Council tax	(215)	-0.1%	Council tax £337k – Increasing discounts and exemptions which have a negative impact on the overall amount collected.	Council tax reduction scheme £552k - cases have tracked slightly lower than budgeted for the year
Year-end surplus	(497)	-0.2%		

3.10 **Budgeted service savings:** Service savings of £10.94 million were required as part of the original revenue budget for 2024/25. 81.6% of these have been met during the year which continues a longer-term trend of under delivery of targets. The ongoing financial impact of the shortfall in delivery will need to be considered as part of the budget forecasting for 2025/26.

Table 2: Service savings delivered

Directorate	Total Saving / Budget recovery	Achieved	Variance to Budget	% met
	£000	£000	£000	
Social Care & Health	(4,972)	(3,650)	1,322	73.4%
Children, Learning, Skills and Economy	(3,172)	(3,103)	69	97.8%
Infrastructure & Place	(927)	(470)	457	50.7%
Customer, Culture and Wellbeing	(1,079)	(961)	118	89.1%

People, Performance and Partnerships	(86)	(86)	0	100.0%
Law & Governance	(33)	(33)	0	100.0%
Resources	(595)	(548)	47	92.1%
Corporate Costs & Levies	(77)	(77)	0	100.0%
Totals	(10,940)	(8,928)	2,013	81.6%

3.11 Further details of the performance against budget savings can be found at **Appendix 2**.

3.12 Eligible revenue costs of £3.68 million have been met from capital receipts reserve funding through capitalisation direction. These costs are principally in the areas of service change and reform, digital approach to service delivery, and collaboration with other public sector bodies. A summary of these costs is shown at **Appendix 3**.

3.13 The 2025/26 budget includes the further use of capitalisation direction of £3.7 million, with the current medium term financial plan modelling a tapering down of this support which is budgeted to end in 2029/30.

3.14 **Robustness of budget forecasting during the year:**

Table 3: Budget forecasting at formal reporting periods

2024/25 Budget forecast in £000's	Total Deficit / (Surplus)	Social care & Health	Children, Learning, Skills & Economy	Infrastructure & Place	Customer, Culture and Wellbeing	Resources	People, Performance and Partnerships	Law & Governance	Other
Update 1	124	2,494	468	963	(46)	18	68	51	(627)
Update 2	4,353	3,897	673	708	(122)	(145)	94	48	(799)
Update 3	1,593	4,211	272	671	(336)	(430)	(6)	2	(2,789)
Update 4	(497)	3,345	(26)	340	(677)	31	(80)	18	(3,448)

- 3.15 Whilst there has been significant variation in the overall forecast budget position during the year, this has largely resulted from the movement in Corporate areas where un-hypothecated grants have been allocated. Service area positions have predominantly improved during the year, reflective of budget recovery action instigated during the year.
- 3.16 It has however been another difficult year to obtain any budget forecasting certainty:
- Late notification of unbudgeted grant and contributions continues;
 - £10.9m of budget savings were required to be delivered;
 - Services were asked to engage in additional budget recovery action part way through the year;
 - Demand for high-cost services remains volatile

4 **School Balances**

- 4.1 Schools continue to face significant budget pressures, particularly in respect of attendance, behaviours and increased additional learning needs. This has required increased staff and specialist resources to tackle the issues presenting and increased the overall costs of provision. Higher than budgeted pay awards have also impacted upon budgets.
- 4.2 The 2024/25 financial year has culminated in a £3,187,000 draw on school's balances, resulting in the cumulative deficit balance increasing to £4,092,000 and with fifteen of thirty-five schools now holding deficit balances.
- 4.3 The ongoing budget challenges at Chepstow Comprehensive, King Henry VIII School, and the Pupil Referral Service remain a significant concern. The Local Authority continues to work closely with representatives from these schools to implement agreed budget recovery plans. It is acknowledged that, due to the scale of the challenges, the recovery process will take longer than initially anticipated.
- 4.4 The Authority continues to work closely with all schools of concern to aid in the return to more sustainable budget plans over the medium term without impacting on educational standards. This will continue to be informed by the ongoing review of school's budgets as part of the periodic update of the medium-term financial plan.

Table 4: Movement in Schools balances

School Balances (Surplus) / Deficit	1st April 2024	Draw upon Reserves	31st March 2025
	£000's	£000's	£000's

Comprehensives	976	391	1,366
Middle	329	1,057	1,386
Primaries	(1,142)	836	(306)
Pupil referral service	742	903	1,645
Total	905	3,187	4,092

4.5 **Appendix 1** provides the detailed explanation of the reasons for the variance to budget, alongside a full assessment of the movement in School balances, and details of the

progress of the Authority's Capital programme during the year.

5 **Reserves**

5.1 **Key considerations**

5.2 The level of the Council Fund reserve stood at £10.4m at the start of 2024/25, excluding delegated school balances. This represented 5% cover as a proportion of the Council's 2024/25 net revenue budget and was in line with the recommendations of the approved Medium Term Financial Strategy.

5.3 The final revenue budget proposals for 2024/25 did not include any use of the Council Fund reserve to balance the budget which was in line with the budget planning framework agreed by Cabinet. The budget did include £1.122 million of planned use of earmarked reserves in support of one-off revenue expenditure.

5.4 In determining the allocation of the outturn position, priority was given to strengthening the Council's financial sustainability. The focus has been on mitigating potential financial risks and enhancing the medium-term financial outlook. Accordingly, the following transfers to earmarked reserves are proposed. These will provide greater resilience against future uncertainties and support strategic investment in key service priorities over the medium term.

5.5 **Proposed reserves rationalisation and replenishment:**

	Gross revenue budget surplus		£-1,238,590	
Contribution from	Priority investment reserve	£-26,512		Releasing unused reserve

Contribution from	Capital support reserve	£-375,340		Reducing reserve from £625k to £250k. Borrowing is the favoured funding stream for longer term capital investments
Contribution to	Programme of change reserve	£350,000		Targeted up-front investment to deliver on programme of change within services
Contribution to	ICT Reserve	£663,608		To provide additional cover for future data & digital priorities
Contribution to	Pay inflation reserve	£129,868		Support pay award pressures in 2025/26
	Movement in earmarked reserves		£741,624	
	Net revenue budget surplus		£-496,966	
Contribution to	Council fund		£496,966	To maintain 5% cover of 2025/26 revenue budget
	Final budget position		£0	

5.6 Based upon the above reserve movements and when taking into account the most up to date financial modelling, the forward projection of reserve balances is shown below:

Table 6: Reserves projection based on 2024/25 outturn and the latest financial modelling

31st March	2024	2025	2026	2027	2028	2029
	£000's	£000's	£000's	£000's	£000's	£000's
Council Fund (Excluding schools)	10,388	10,885	10,885	10,885	10,885	10,885
Strategic earmarked reserves	6,254	5,687	5,049	4,858	4,667	4,476
Sub-Total Non-specific reserves	18,666	18,597	17,960	17,770	17,580	17,390
Partnership earmarked reserves	2,248	1,912	1,762	1,637	1,687	1,737
Service specific earmarked reserves	856	1,031	2,699	2,727	2,755	2,783
Council tax premium reserve	0	809	1,172	1,559	1,971	2,409
Sub-Total specific reserves	3,104	3,752	5,633	5,923	6,413	6,929
Total	21,770	22,349	23,593	23,693	23,993	24,319

- 6.1 Capital expenditure totalled £48.81 million for the year, with a gross under spend of £2.73 million reported.
- 6.2 This was primarily due to the programmes of work within Infrastructure and Property maintenance not being fully spent, alongside the receipt of additional grant which has allowed core budget to be released. Alongside this, the vehicle replacement programme did not require the full allocation of budget.
- 6.3 After allowing for capital financing adjustments, £1.3m of the gross under spend is available to be repurposed to create a capital contingency budget for 2025/26 to mitigate scheme risks or address emerging capital priorities.
- 6.4 **Capital slippage – Appendix 1** details capital schemes requiring slippage into next financial year.
- 6.5 Capital schemes by nature are usually multi-year, and some slippage is to be expected as expenditure profiles change based on flex in project circumstances. A total of 98 capital schemes require slippage into 2025/26 totalling £25.032 million representing 33% of the total budget for the year.
- 6.6 Over two-thirds of the slippage (£17.547 million) relates to eight larger schemes within the capital programme, as follows:

Scheme name	Slippage £000's	Comment
ATF Core Llanfoist Bridge & Meadow Links	4,368	Slippage required to align with revised scheme programme of works as agreed with the grant awarding body
Welsh Medium School and Nursery	2,696	Slippage required to align with revised scheme programme of works as agreed with the grant awarding body
Wye Bridge Monmouth	2,166	Initial phases of work were pushed back to allow wider programme of resurfacing works to be carried out within the area. These works faced delays due to external issues with third parties, which has meant that a revised schedule of works is required for Wye Bridge. Whilst some initial design and feasibility works will be carried out within 2025/26, it is recommended that this budget is slipped forward to 2026/27 to align with the revised schedule.
Capital Region City Deal	1,948	Re-profiling of contributions as required by the programme of works delivered by the South East Wales Corporate Joint Committee

Property Acquisition for Children and Young People with Complex Needs	1,867	Multi-year scheme which relies on suitable properties being identified to match demand requirements
Asset Investment Fund	1,781	Remaining budgeted designated to cover any ongoing capital expenditure required on investment properties. This allocation ensures that sufficient funds are available to address maintenance, improvements, and other capital-related expenses, thereby safeguarding the value and functionality of our investment assets.
Housing Provision Borrowing Headroom	1,421	Acquisition strategy in development to formalise arrangements in respect of buying properties to address homeless issue & support the implementation of our Rapid Rehousing Transition Plan 2025/26
Capital contingency fund	1,300	£1.3m of released budgets will be carried forward to 2025/26 as a contingency budget to mitigate capital budget risks developing in year. This can either be on schemes already in progress and facing additional cost pressures, or to meet new risks that were not foreseen at budget setting stage.

- 6.7 The internal and external operating environment continued to affect the capital programme during 2024/25. Challenges such as limited internal capacity, constraints in accessing external professional support, and isolated supply chain disruptions have hindered project delivery. Over time, these issues may lead to financial consequences, particularly due to inflationary pressures and the implications for capital financing strategies.
- 6.8 **Capital receipts** – The table below outlines the latest forecast of capital receipts balances available to meet future capital commitments. The full balance of capital receipts is committed to future capital investment meaning there is little scope to support additional capital investment. This also means that the level of capitalisation direction support is profiled to taper down to zero over the medium term.

Table 5: Capital receipts balances

Capital receipt balances	2024/25	2025/26	2026/27	2027/28	2028/29
	£000's	£000's	£000's	£000's	£000's
Balance as at 1st April	9,984	6,082	4,033	1,877	422
Capital receipts used for financing	(418)	(557)	(50)	(50)	(50)
Capital receipts used to support capitalisation direction	(3,682)	(3,770)	(2,708)	(1,708)	0
Capital receipts Received	198	0	0	0	0

Capital receipts Forecast	0	2,278	603	303	0
Forecast Balance as at 31st March	6,082	4,033	1,877	422	372

7 **2025/26 revenue budget – early update**

7.1 **Budget Context**

7.2 The Council faced a complex and challenging financial environment in preparing its 2025/26 budget, with volatility in the demand for services, continuing economic uncertainty, and operational challenges.

7.3 The budget process began with a significant funding gap of £11.4 million, driven by £15.5 million in cost pressures and only £4.1 million in projected income growth. This gap widened further as updated forecasts revealed £23.7 million in new cost pressures - equivalent to 11% of the Council's total budget. This marks the third consecutive year the Council has needed to manage pressures exceeding £20 million, a scale far beyond the £5 - 10 million challenges it has historically faced.

7.4 A major driver of these pressures is the rising demand for services, particularly in Children's and Adult Social Care, Homelessness, and Additional Learning Needs. These demands are being fuelled by ongoing socio-economic difficulties and changes in the health sector, where efforts to streamline NHS patient pathways are increasing the complexity and volume of social care needs. This shift places additional strain on Council services, which must adapt to meet these growing and evolving demands.

7.5 The broader economic environment is compounding these challenges. The cost-of-living crisis is increasing reliance on Council support services while simultaneously reducing income from fee-based services. Although headline inflation has eased, specific service areas continue to face high costs and supply chain disruptions. Higher interest rates are also adding to financial strain, and skills shortages in some key areas continue to impact the Council.

7.6 Despite these pressures, funding growth has been limited. The Welsh Government's initial settlement offered only a 2.6% increase - below the 4.5% Welsh average, though a later funding floor increased this to 3.8%, adding £1.54 million. To help close the gap, the Council proposed £6.2 million in service savings and efficiencies, alongside additional income measures. However, the scale and persistence of the financial challenges indicates that difficult decisions will continue to be required throughout 2025/26 to ensure the Council remains financially sustainable while continuing to support its communities.

7.7 **Early indications**

- 7.8 At this early stage in the financial year, services are reporting emerging cost pressures across several areas.
- 7.9 In Children's Additional Learning Needs, demand is currently tracking above the levels anticipated during budget setting. Within Children's Social Care, delays in the operational readiness of new facilities are contributing to financial strain. Adult Social Care is also experiencing ongoing pressures due to the full-year impact of additional placements that commenced late in the previous financial year and were not accounted for in the current budget.
- 7.10 The planned savings from corporate mileage reductions have been affected by procurement delays, which have postponed the rollout of the pool car initiative. Similarly, the temporary closure of Abergavenny Leisure Centre, as part of the King Henry VIII development, has led to a freeze in leisure memberships and swimming lessons, impacting income.
- 7.11 School transport is facing challenges in achieving savings due to changes in pupil numbers and safety concerns on certain routes, which have necessitated continued transport provision. In Homelessness services, anticipated savings from the transition to the Severn View site have been delayed, further contributing to the overall budgetary pressure.

7.12 These early indicators highlight the need for close monitoring and prompt mitigation to ensure financial stability throughout the year.

7.13 **Remaining budgetary risks for 2025/26**

- 7.14 Alongside the above early indications, there remain key specific budgetary risks that have the ability to further impact upon the revenue budget during 2025/26:
- **Pay award** – The 2025/26 budget assumes a 3.1% increase for NJC and Teachers' pay. Any final agreement exceeding this assumption will result in an additional ongoing financial pressure. As an indication, a variance in pay award of 0.5% represents around £500k in costs.
 - **National insurance** – The budget assumes that the increased national insurance costs for directly employed staff will be fully funded. However, there is still uncertainty regarding both the total amount of funding and how it will be allocated, as no official notification has been received. An additional risk is that the Council's key partners and suppliers may not be able to absorb their own rising national insurance costs, potentially passing on unavoidable additional expenses to the Council beyond what has been budgeted.
 - The **deliverability risk** of budget savings, especially where these involve the income generation, changes to structures, alternative delivery models or have implications for service design involving community or other partners. If the long-term average delivery rate of 85% is repeated, this would represent a further pressure of circa £1m.

- The trend of **reducing debt recovery**, particularly within Council tax where there is a significant increase in the number of discounts and exemptions awarded which has a negative impact on overall income. There is also a slowing down in collection rates as households continue to struggle with the cost-of-living crisis.
- **Schools reserves** – schools have budgeted for a further draw on reserves for 2025/26. If this materialises it will increase the cumulative schools reserve deficit being carried on the Council's balance sheet. This consequently impacts upon the Council's financial resilience and increases its risk exposure by reducing available balance sheet resources.

7.15 The delivery of a balanced budget position for 2025/26, alongside substantial budget recovery action within schools will be fundamental in maintaining financial stability. It is therefore essential that services maintain the same financial discipline that saw significant budget recovery in the latter stages of 2024/25.

RESOURCE IMPLICATIONS:

The report itself covers the resource implications of the entirety of the revenue and capital budget activity during the year. There are no further resource implications as a result of the recommendation in this report.

EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING):

- 9.1 This report provides Members with information on the revenue and capital outturn position of the Authority and carries no decisions. There are therefore no equality of future generations' implications directly arising from this report.
- 9.2 Any such impacts will be fully considered subsequently when Council receives further budget proposals.

CONSULTEES:

Senior Leadership Team
Cabinet members

BACKGROUND PAPERS:

Appendix 1 – Revenue and capital outturn report including school budgets

Appendix 2 – Performance against budgeted savings

Appendix 3 – Capitalisation directive schedule

Appendix 4 – Movement in individual school balances

Appendix 5 – Capital budget revisions requiring Cabinet approval

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Appendix 1 – 2024/25 Budget outturn report

Section 1	Revenue budget position at Outturn
Section 2	Detailed service commentary on Outturn
Section 3	School balances at Outturn
Section 4	Capital budget position at Outturn

Section 1 - Overall Revenue Position

Table 1: 2024/25 Revenue budget outturn summary statement

Service Area	Original Budget 2024/25	Budget Adjustments	Revised Annual Budget	Outturn	Actual (Under) / Over Spend @ Outturn	Forecast (Under) / Over Spend @ Update 3	Variance
	'000's	'000's	'000's	'000's	'000's	'000's	'000's
Social Care, Health & Safeguarding	68,410	(193)	68,217	71,562	3,345	4,211	(866)
Learning, Skills and Economy	65,152	(6)	65,146	65,120	(26)	272	(298)
Infrastructure & Place	26,188	(126)	26,062	26,402	340	671	(331)
Customer, Culture and Wellbeing	8,304	(166)	8,138	7,461	(677)	(336)	(341)
People, Performance and Partnerships	3,288	140	3,427	3,347	(80)	(6)	(74)
Law & Governance	2,894	(70)	2,825	2,843	18	2	17
Resources	8,891	(148)	8,743	8,773	31	(430)	461
Corporate Costs & Levies	29,477	287	29,763	26,272	(3,491)	(1,607)	(1,883)
Net Cost of Services	212,603	(282)	212,321	211,781	(540)	2,776	(3,315)
Appropriations	7,301	590	7,891	8,148	258	(565)	823
Expenditure to be Financed	219,904	307	220,211	219,929	(282)	2,210	(2,492)
Financing	(219,904)	(307)	(220,211)	(220,426)	(215)	(617)	402

Net General Fund (Surplus) / Deficit	0	0	0	(497)	(497)		1,593	(2,090)
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Table 2: 2024/25 Revenue budget outturn detailed statement

Service Area	Original Budget 2024/25	Budget Adjustments	Revised Annual Budget	Outturn	Actual (Under) / Over Spend @ Outturn		Forecast (Under) / Over Spend @ Update 3	Variance
	'000's	'000's	'000's	'000's	'000's		'000's	'000's
Adult Services	42,816	(45)	42,771	44,129	1,358		2,040	(683)
Children Services	22,450	(133)	22,317	24,709	2,392		2,468	(76)
Public Protection	1,982	(32)	1,950	1,666	(284)		(279)	(5)
SCH Support	1,162	17	1,179	1,059	(120)		(18)	(102)
Social Care, Health & Safeguarding	68,410	(193)	68,217	71,562	3,345		4,211	(866)
Economy, Employment & Skills	299	(4)	295	131	(164)		(159)	(5)
Emergency Planning	170	(1)	169	183	14		25	(11)
Individual Schools Budget	52,459	8	52,467	52,529	62		41	21
Resources	1,032	13	1,045	1,081	36		17	19
Standards	11,192	(21)	11,171	11,196	25		348	(323)
Learning, Skills and Economy	65,152	(6)	65,146	65,120	(26)		272	(298)
Enterprise, Housing & Community Animation	2,735	(116)	2,618	2,621	3		(104)	107
Facilities & Fleet Management	10,124	489	10,612	10,993	380		539	(159)
Neighbourhood Services	11,305	(102)	11,204	11,327	123		459	(336)
Placemaking, Highways & Flood	2,024	(396)	1,628	1,461	(166)		(223)	57
Infrastructure & Place	26,188	(126)	26,062	26,402	340		671	(331)
Communications	434	(5)	429	332	(97)		(38)	(59)
Countryside & Culture	1,141	(6)	1,135	1,043	(92)		(65)	(27)
Finance & Business Development	4,336	29	4,365	4,314	(51)		44	(95)
Leisure, Youth & Outdoor Adventure	2,393	(184)	2,209	1,772	(437)		(277)	(160)
Customer, Culture and Wellbeing	8,304	(166)	8,138	7,461	(677)		(336)	(341)

Policy, Scrutiny & Customer Service	1,415	166	1,580	1,507	(74)	(28)	(46)
People	1,873	(26)	1,847	1,841	(6)	22	(28)
People, Performance and Partnerships	3,288	140	3,427	3,347	(80)	(6)	(74)
Democratic Services	1,847	(53)	1,795	1,814	19	(20)	39
Legal and Land Charges	1,047	(17)	1,030	1,030	(1)	21	(22)
Law & Governance	2,894	(70)	2,825	2,843	18	2	17
Commercial, Corporate & landlord Services	1,867	(218)	1,649	1,987	338	(39)	377
Corporate Health & Safety	92	63	155	151	(4)	(0)	(4)
Finance	3,936	4	3,940	3,626	(314)	(351)	37
Information Communication Technology	2,996	3	2,999	3,010	11	(40)	51
Resources	8,891	(148)	8,743	8,773	31	(430)	461
Precepts & Levies	26,532	0	26,532	26,528	(4)	3	(7)
Coroner's	278	0	278	290	12	0	12
Archives	213	0	213	219	6	6	(0)
Corporate Management	398	0	398	337	(61)	9	(70)
Non-Distributed Costs (NDC)	577	0	577	437	(140)	182	(322)
Strategic Initiatives	(350)	287	(64)	(3,068)	(3,004)	(1,766)	(1,238)
Insurance	1,828	0	1,828	1,530	(298)	(41)	(257)
Corporate Costs & Levies	29,477	287	29,763	26,272	(3,491)	(1,607)	(1,883)
Net Cost of Services	212,603	(282)	212,321	211,781	(540)	2,776	(3,315)
Interest & Investment Income	(1,176)	0	(1,176)	(1,313)	(137)	34	(171)
Interest Payable & Similar Charges	7,252	0	7,252	7,049	(203)	(339)	136
Charges Required under Regulation	6,230	0	6,230	6,779	549	168	381
Other Investment Income	0	0	0	(7)	(7)	0	(7)
Attributable Costs - Fixed Asset Disposal	0	0	0	3	3	0	3

Borrowing Cost Recoupment	(3,883)	0	(3,883)	(4,725)	(842)		(464)	(378)
Capital Expenditure Financed from Revenue	0	68	68	68	(0)		0	(0)
Contributions to Reserves	833	533	1,366	2,509	1,143		217	927
Contributions from reserves	(1,955)	(11)	(1,966)	(2,214)	(248)		(181)	(67)
Appropriations	7,301	590	7,891	8,148	258		(565)	823
Expenditure to be Financed	219,904	307	220,211	219,929	(282)		2,210	(2,492)
General Government Grants	(91,149)	0	(91,149)	(91,149)	0		0	0
Non-Domestic Rates	(34,871)	0	(34,871)	(34,871)	0		0	0
Council tax	(102,294)	(307)	(102,601)	(102,265)	336		(92)	428
Council Tax Benefit Support	8,410	0	8,410	7,858	(552)		(525)	(27)
Financing	(219,904)	(307)	(220,211)	(220,426)	(215)		(617)	402
Net General Fund (Surplus) / Deficit	0	0	0	(497)	(497)		1,593	(2,090)

Section 2 - Directorate – Service Variance Comments

SOCIAL CARE, HEALTH & SAFEGUARDING	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	2,494	3,897	4,211	3,345
The directorate outturn position shows an improvement with a variance of £866K since update 3. This is comprised of last minute WG grant monies distributed via Health (£500K) including slippage arising from the Gwent Regional Integrated fund and the 'Further, Faster' grant provided to increase community capacity within adult care. There was a further saving against held vacancies in direct care (£200K) and revenue savings of £166K following a WG grant to support the first year's implementation of a new case management system for social care. Whilst it is pleasing to see an improved year end position, the directorate nevertheless showed a deficit of £3.345M, reflective of significant challenges within social care (Adult and Children's services). <u>Adult Services</u> Aligned with the aging demographic, the needs of adult residents within the county who require social care and support are becoming more complex. For example, the numbers of adults entering residential placements continues to trend upwards. The cost of care is increasing in line with changes in Real Living Wage and inflationary pressures. This year there was a £230K shortfall against the budgeted cost of in-year fee increases for provider services (including domiciliary care, residential care and support service contracts). The service continues to implement a strategic change programme including the development of a reablement pathway; new approaches to commissioning; enhanced advice and support at the 'front-door'; improvements to hospital discharge arrangements and ensuring consistency around eligibility and the application of a strengths-based approach within assessments, care planning and reviews. The programme is aimed at achieving increased sustainability in the face of on-going demand. The challenges within adult services with respect to meeting both existing and new demand undermined our ability to meet the entirety of our expected savings in respect of 'practice change' albeit the workforce mandate was achieved in full. <u>Children's Services</u> Regarding children's services, although the number of children who are looked after by the Local Authority has maintained a slight downturn over recent years, the children who enter the care system tend to have more complex needs. This, together with on-going shortages in placements, continues to drive up the cost of children's care. The £2.4M overspend within children's services relates predominantly to the cost of new children coming into care (including those on a temporary basis) or where new placements have had to be sought following placement breakdowns.				

The service has a well progressed placement development strategy in place which is starting to support the ambition to achieve better outcomes for children using in-house placements representing better value for money. This is illustrated by the ability to generate savings of £1.2 M through effective care and progression planning for children (a deficit of just of £100K against the mandate).

The service remains committed to supporting children to remain living safely at home within their families and communities wherever possible. There is a suite of family support services in place to support this endeavour, although some of these services are currently dependant on WG grants creating some potential instability.

As in previous years, the directorate, benefited from a number of Welsh Government grants at approximately £3M including Workforce grant, Regional Integration Fund and the Radical/Eliminate grants, which were used to bolster core service provision. This represents an additional risk and potential pressure for the service in that there is little certainty over the extent to which these grant streams will be maintained in the medium term. The directorate has additionally benefited from some savings in public protection, largely as a result of savings against posts.

ADULT SERVICES

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	1,534	2,505	2,040	1,358

Over the year the demand for adult services has remained high with referrals emanating from both the community and from hospitals. The needs and complexity of many residents are increasing requiring more intensive assessments and services.

The overspend for the Integrated Services has been due to the increased demand for care. For non- residential care provision, activity data shows an increase in the care provided towards the end of Qtr 2 and into Qtr 3 with a further increase in Qtr 4. At year end there 570 people supported and provided with 1,230 weekly care hours.

Another particular pressure is external care home placements. Care at home placements are not made without management oversight and where all other options for care provision have been explored. Nevertheless, care home placements have increased during the year by 10%, increasing from 310 at the start of the year to a close of 341. This includes both older adults, dementia care and younger people with complex learning disability or mental health support needs. This creates pressure within the budget, as the number of placements are hard to predict at budget setting (including existing and new placements).

A further pressure of £375K has arisen as contrary to previous indications, WG have confirmed that any potential increase to the non-residential weekly care charging cap will not go ahead. A small amount of grant totalling £70K has been awarded to offset this.

The service has put in additional controls around how new care services are provided, which is helping to ensure that care is provided with parity across the area and allocated according to the most pressing needs. As and when opportunities arise, care at home is being re-brokered to ensure that costs are minimised as far as possible without compromising people's care and support needs. The new commissioning arrangements for domiciliary care in the South will offer better opportunities to accurately forecast spend as hours are purchased in blocks and premium rates eliminated from the pricing structure.

The ongoing programme of reviewing existing care remains challenging because of the pressure of managing new referrals and assessments; however additional resource has now been turned to reviewing care arrangements using some external funding. As health are re-trenching around their own cost pressures, we have been unable to make progress in successfully pursuing Continuing Health Care costs; however individual cases remain under regular review.

CHILDREN’S SERVICES

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £’000s	1,134	1,536	2,468	2,392

The first quarter of this year saw an increase in the population of Children Looked After (CLA) which rose from 199 at the start of the year to 208 at the end of July including an increase in the number of residential placements from 21 to 23. This created creating a pressure of £1M.

As at end of Update 2 the number of children looked after was 205 a reduction of 3. During this period 30 children became looked after and 24 children ceased to be looked after. The new entrants included a family of 5 siblings, a family of 3 siblings and 5 families of 2 siblings. The needs of the children and the lack of suitable alternative in house placement options resulted in 2 new entrant children being placed in residential care and 5 in For Profit Foster care. In addition, 8 children entered “Parent and Child” assessment placements which included a parent with 4 siblings and 3 individual children with their respective parents. Whilst such placements are time limited (approx. 12 weeks) they are high cost with each placement mandated by Family Court during Proceedings. A further net pressure of £403K had arisen due to the needs of these children.

At the end of Update 3 although the numbers of children being looked after had remained stable, the degree of change and movement underneath the headline figure continued to have an impact. This included one high cost residential placement, a further 6 parent and child placements and extensions to 2 others. This created a further in-year pressure of £932K.

Some anticipated movements in placements were delayed in accordance with the needs of the children thereby reducing the amount of savings that could be achieved. In addition, this year has seen a higher than usual number of children's placements breaking down, such that there is then no option but to place in a higher-cost placement.

Lack of placements for children remain a significant challenge within the service with ongoing instability and uncertainty within external providers of both residential and IFA placements, resulting in increased costs for external placements, more competition for placements and less movement. The recruitment of in-house foster carers also remains a challenge. The service is continuing to develop its own provision including the opening of a step-down provision for young people aged 16+ expected which became operational in November 2024 and a children’s residential home expected to be operational in July 25.

The service continues to review all CLA children's placements with a focus on high-cost placements. The service is able to utilise the suite of grant funded family support services that are in place to manage risk in the community and directly address parenting issues to ensure that all opportunities for

children to remain in family care or return to family care are maximised. This is despite the acknowledged complexity of children's needs and presentations which means there is not always a direct route out of care or high-cost placements.

In this way, the Children Services projected saving target has been almost achieved. The final quarter of the year has seen on-going work to stabilise placements and the planned reductions in CLA brining numbers down to 190 children, 12 of whom were UASC via the National Transfer Scheme. There was an increase in the numbers of children completing legal proceedings not on an order to the Local Authority and residing with family members which created a financial cost saving which mitigated the crisis demand previously seen within the year.

Alongside the pressure arising from children's placements, there is a further pressure of approximately £200K within the Family Time team out of hours service. The establishment of the out of hours service in 2023 was in response to the significant costs of using private nursing agencies to manage risk in the community (keeping children at home or under supervision in a hospital whilst safeguarding investigations are ongoing). This is a cost avoidance (overspend management) strategy which has seen a reduction of up to 60% in the use of external agencies despite the service supporting 2 children to step down from residential care placements.

PUBLIC PROTECTION

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'s	(175)	(147)	(279)	(284)

The underspend is mainly as a result of staff vacancies, including the head of service role. 2 posts having external funding and income above budget.

SCH SUPPORT

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	1	2	(18)	(120)

This budget area delivered an under spend at outturn due to a staff vacancy and end of year funding for work undertaken on the care management replacement system.

LEARNING, SKILLS and ECONOMY DIRECTORATE	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	468	523	296	(26)

CHIEF OFFICER COMMENTARY:

The Directorate's outturn is an underspend of -£26,286.

This is due to several Welsh Government grants being received since update 3, as well as a number of ALN pupils leaving Independent Schools and the costs for ALN pupils receiving EOTAS (Education Other Than At School) Bespoke packages, not being as much as previously forecast

Further additional costs across the Directorate have been offset with holding vacancies and through income generation.

Economy, Employment & Skills

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'s	0	(149)	(159)	(164)

An ability to passport core costs to grant funding, and a reduction in supplies and services.

Emergency Planning

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'s	16	16	14	14

The overspend is due to employee related savings not being met.

Individual Schools Budget

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	(4)	0	41	62

The additional overspend since Update 3 is due to expenditure relating to the Mounton House site (£14k), along with several other unforeseen costs, such as Box-It Charges, a BT PSBA line upgrade for OLSM School etc

Resources

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	17	43	51	36

The reduction in the overspend since Update 3 is due to a further reduction in income against the Photovoltaic Grids, which has been offset by the Teacher Pension Costs not being as much as expected and receipt of grant funding.

Standards

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	440	614	348	25

The large reduction in the overspend since Update 3 is due to a number of ALN pupils leaving Independent Schools, the costs for ALN pupils receiving EOTAS (Education Other Than At School) Bespoke packages, not being as much as previously forecast, and receipt of additional grant funding, which could be used to offset existing costs.

INFRASTRUCTURE & PLACE DIRECTORATE	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	963	955	671	340

INFRASTRUCTURE & PLACE DIRECTOR'S COMMENTARY:

The directorate reported an overspend of £340k, representing an improvement of £331k since Update 3. A detailed breakdown by service area is provided below. The financial performance for 2024/25 was primarily impacted by overspends in demand-led services—namely School & Passenger Transport, Homelessness, and Waste Services—as well as reduced income in areas affected by economic uncertainty, such as Planning & Building Control.

The directorate achieved £470k (50.7%) of its £927k savings target. The shortfall is largely attributable to two factors: the inability to realise the £400k savings anticipated from relocating tenants to Severn View, due to delays in the site becoming operational, and a shortfall in planning fee income.

Enterprise, Housing & Community Animation

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(107)	54	(104)	3

Enterprise & Community Animation has over spent by £3k, this is mainly due to: -

- **Enterprise Mgt** - £339k underspent – due to employee savings through the removal of vacant senior management posts as part of the in-year SLT restructure, a late year grant windfall relating to the project administration of the Marches forward programme, further staff savings within our Strategic Operations team by not backfilling a senior officer post during maternity leave and leaving a vacant IT officer post unfilled (£38k). In addition, a £62k saving was achieved on our City Deal contribution as this has been moved to capital in line with the authority's in-year budget recovery plan.
- **Housing** - £342k over spent, broken down into these main areas: -
 - **Homelessness** - £398k net overspend – there are a number of factors that have contributed to the overspend this year. As previously reported, the planned £400k saving from relocating tenants to Severn View could not be realised this year due to delays in planning permission and subsequent refurbishment of the site. Additional cost pressures have arisen from increased rental, repairs, maintenance, and ancillary expenses, linked to the expansion of our leasing portfolio as we transition away from B&B placements. These pressures

have been partially offset by a £163k reduction in the Housing Benefit Subsidy penalty, reflecting the financial benefits of reducing B&B use (currently 20 placements, down from 44 in May 2024). Further mitigation came from a £232k Welsh Government discretionary homelessness grant and £63k in staffing savings (due to vacancies and grant recharges). This is a £201k increase in overspend compared to Update 3. This rise is attributed to unforeseen maintenance costs, lower-than-expected Housing Benefit income, and year-end bad debt write-offs.

- **Assistive Technology (Formerly Careline)** – £56k under spent – mainly due to the receipt of grant funding which allowed us to offset staff costs, a positive increase in the client base and the reduction in equipment expenditure, as stock replenishment funded through grants in 2023/24 reduced the need for additional purchases during the current year.

Facilities & Fleet Management

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	867	773	539	380

Facilities, Fleet & De-carbonisation has over spent by £380k, this is due to:-

- **Decarbonisation** - £11k net underspend – this can be attributed to the following factors:-
 - Corporate Mileage Saving - £100k over spent – no change from Update 3 – with the required changes to the corporate travel and disbursement policy not being implemented in 24-25 we weren't able to roll-out the Pool car scheme and other saving initiatives resulting in all the £100k budget saving not being achieved.
 - Corporate Energy Saving - £111k under spent – final consumption figures for the authority came in below budget generating an underspend on our utilities cost.
 - Solar Farm - £69k over spent – income improved in the latter half of the year but poor weather and grid outages earlier in the year impacted on the budget, the solar farm made a surplus of £304k in 24/25 but this is £69k less than the budgeted surplus of £373k.
 - De-Carbonisation Team - £212k under spent – because of staff savings due to 3 posts that have remained vacant all year (2 posts have since been filled with only 1 energy officer position left to appoint) and an increase in carbon reduction grant funding.
 - Sustainability - £28k under spent – due to energy savings generated from our renewable energy infrastructure that is installed throughout our buildings.
- **Passenger Transport** – £555k net over spend – this is due to increased service demand as pupil numbers have increased resulting in additional contract costs. Since update 3 there has also been further increases in external contract costs due to one operator handing all contracts back due to ill health which were retendered and resulted in an increase in prices. This has been offset in part by being able to move further staff costs to capital grants and by the receipt of administration funding for the regional Bus Network Grant in 24/25 plus a one-off windfall payment relating to a balance owing from 23/24. In addition, we have also benefitted from the receipt of income from the sale of 2 coaches during the year.

- **Fleet Maintenance** - £11k over spent – The budget has been impacted in-year by the rising cost of parts, supply chain delays, the growth in hire vehicles and increased borrowing spend as we transition our fleet to EV, but we were able to move qualifying ICT, EV and maintenance costs to capital (as per budget recovery plan) and this helped reduce the net overspend to £11k.

Neighbourhood Services

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	263	237	459	123

Neighbourhood Services has over spent by £123k, due to:-

- **Streetlighting** – £21k under spent – due to a reduction in maintenance as we were able to passport qualifying costs to capital as part of in-year budget recovery.
- **Highways Operations** – On Budget.
- **Highways External** - £136k under spent – income received from external works has exceeded original budget. The partnership works we do for SWTRA (South Wales Trunk Road Agency) came in on budget as per the cost recovery arrangement.
- **Highways Design & Road Safety** - £120k under spent – mainly as a result of 4 staff vacancies, a decision was made part way through the year to not fill these posts to aid with in-year budget recovery. It is the intention that these posts will be filled in 25/26.
- **Waste & Grounds Maintenance** - £399k overspent – a £279k improvement from Update 3 – volatility in the market in 24/25 reduced the value of our re-cyclate and a delay in entering into a new recycling contract impacted savings further although this was resolved in February enabling some savings in the latter part of the year. Income was affected by the introduction of Workplace recycling regulations, the changes we have made to charging structures to accommodate this has resulted in a large reduction in trade waste collection income plus additional recycling collection costs. These coupled with the volatility of end market values has resulted in a pressure on the bottom line. In addition, the 24/25 budget was built on the premise that our poly-prop service would be fully operational from the 1st of April, delays in vehicle delivery meant that the service did not start in full until November resulting in our early year disposal costs being higher than originally anticipated. The service was able to passport £213k of qualifying spend to the capital programme and this coupled with the new recycling contract agreement helped reduce the overspend to £420k and is the reason for the improvement since update 3. Grounds maintenance returned a £22k under spend for the year mainly driven by increased income.

Placemaking, Highways & Flood

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(58)	(110)	(223)	(166)

Placemaking, Highways & Flooding has under spent by £166k, due to:-

- **Building Control** – £76k over spent – this is due to 2 main reasons 1) the uncertainty around the economy has resulted in a drop off in applications reducing rechargeable fee income 2) the introduction of the Building Safety Act 2022 has increased the amount of statutory non-chargeable works having to be undertaken adversely affecting staff and income budgets.
- **Planning & Development Control** - £80k over spent – no change from update 3 – over spend due to a reduction in planning fee income (inc Fast Track) compared to budget expectations mainly driven by the uncertainty around the economy impacting on application numbers.
- **Car Parks & Civil Parking Enforcement** - £16k over spent – a £75k adverse swing from Update 3 – parking & PCN income dropped off towards the end of the year and fell short of our Update 3 forecast by £56k, pay & display activity was showing an upward trend through to Christmas and we were anticipating that this would continue through to year end, unfortunately activity fell and is the main reason for the variance in outturn. In addition, there were late year costs relating to drainage surveys (£4k) and additional employee back pay as a member of staff had to leave due to long term sickness (£15k), both of which were not known in December.
- **Highways Development & flooding** - £126k under spent – a £43k adverse swing from Update 3 - mainly due to improved income because of additional Highways development fees and capital programme fees that have exceeded budget. These have been part offset by increased costs within flooding where late year spending mainly on Tintern flood watch and sandbagging have pushed the service into a £20k overspend and is the reason for the adverse swing at outturn.
- **Schools Catering** - £156k under spent – mainly due to in-year staff savings (£100k) resulting from delays in replacing staff who left during the year and a net increase in UFSM income (£56k) due to 24/25 grant income exceeding budget, the level of grant cannot be confirmed until end of year and is the reason for the increase in underspend at outturn.
- **Monmouthshire Regeneration Team** - £56k under spent – the regeneration projects team has underspent by £56k, this is due to the ability to claim staff time back through the regeneration grants that the team oversee. The level of recharge could not be finalised until year end and is the reason for the improvement in position at outturn.

Customer, Culture and Wellbeing Directorate	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	(46)	(165)	(336)	(677)

At outturn the directorate has underspent by £677k, representing a significant improvement of £341k compared to financial update 3. During the financial year we have seen delays in the implementation of the area management restructure, alongside deferred staff savings within the museums service and reduced income at our attractions, all of these have been offset by increased revenues from our leisure services, markets and countryside departments leading to an overall positive outturn position for the directorate.

This improvement has mainly been due to increased one off grants. £90k (additional SPF funding), £25k ATF Communications and Engagement Funding, £30k capitalisation as per update 3 recovery plan. Along with improvement in leisure centre income of £196k. This improvement in income is attributable to our marketing campaigns and the diligent efforts of our sections to enhance customer experiences. Consequently, these efforts have resulted in the addition of new members and improved membership retention. Notably, a 35% increase in Monthly Direct Debit memberships post pandemic, increase in

membership retention averaging at 21 months retention period an improvement from 19 months in 24-25 and this year's January annual campaign has generated an annual income of £135,882.

This year, we have made significant strides in enhancing accessibility to our sites, ensuring they are welcoming and accessible to all. A key achievement has been the notable increase in our passport to leisure memberships, which has risen from 106 members to 223 members. We remain committed to engaging with our customers and will continue to foster growth in this area.

Additionally, we have observed positive trends in several key matrix, including an increase in the number of members successfully completing the exercise referral scheme, higher participation rates in national exercise referral sessions, a growing number of members utilising a My Wellness Account, increase in the number of green infrastructure projects delivered across the county and the number of active travel routes delivered/being developed, these improvements highlight the support our services provide in our communities health and well-being.

Countryside & Culture

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	(6)	(39)	(66)	(92)

Countryside & Culture section

The section has underspent by £92k an improvement of £26k from update 3 this is due to additional grant income, thereby reducing our reliance on core funding.

Communications

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	0	(44)	(38)	(97)

Central Communications

The section achieved a significant underspend of £97k. This financial efficiency has been realised through strategic allocation of staffing costs to individual grants within the community and partnership division, £50k of Active Travel funding to support promotional works and the secondment of one member of the team to WG, thereby reducing our reliance on core funding.

Finance & Business Development

Outturn Forecast	Update 1	Update 2	Update 3	Outturn
Deficit / (Surplus) £'000s	62	174	44	(51)

Finance, Business and Development

The section has underspent by £51k, this is a substantial improvement on Month 3 update of £95k, this is due to additional capitalisation directive funding of £30k and improved income positions in both our markets and Bourgh Theatre.

Attraction sites have overspent by £62k due to lower than expected visitor numbers, which were affected by adverse weather during the summer. Efforts have been made to offset the reduction in income through one-off events and grant opportunities.

The **Borough Theatre** has overspent by £16k due to lower than anticipated income. This is an improvement on update 3 of £14k. The section is still recovering post-pandemic and from site closures, but we continue to see improvement month on month. Additionally, there has been a reduction of 50 seats, limiting opportunities for larger performances. However, there has been an improvement in the third quarter of 24-25, which is hoped to continue into the next financial year, reducing reliance on core funding.

Learning has overspent by £17k due to reduced income.

Museums have overspent by £44k due to delayed staff savings and higher than anticipated expenditure. The section will seek to use any available grant opportunities or reserve balance to mitigate this where possible.

Community Hubs have overspent by £62k, due to higher than anticipated staffing costs, one off photo copier replacements to allow for public printing to return and lower than anticipated income.

Management has overspent by £25k due to delayed implementation of the area management structure. This process is underway, and the changed structure is likely to be implemented in the final quarter of 24-25.

These overspends have been offset by underspends in other areas: **markets (£154k)**, **business support (£32k)**, **Community Education (£25k)** and the **contact centre (£54k)** due to increased income, reduced overheads, and staff vacancies.

Leisure, Youth & Outdoor Adventure

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(102)	(257)	(276)	(437)

Leisure, Youth and Outdoor Adventure has underspend by £437k, an improvement from update 3 of £161k this is due to increase income at our four leisure facilities, we have seen continued growth in our monthly Direct Debit memberships, improved membership retention due to improving our

customers journey and investing in digital and site improvements. Along with additional grants which have been used where applicable to offset core staffing costs whilst still delivering the outcome of the grant.

Pre covid monthly memberships were £160k per month we are currently running at a month DD collection of £215k this is an improvement of £55k per month a 35% increase in membership post pandemic.

The Outdoor Adventure Centre has improved its residential income position on 23-24, moving from an overspend position in 23-24 to a slight underspend in 24-25 of £5k.

People, Performance and Partnerships Department	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	68	94	(6)	(80)

CHIEF OFFICER COMMENTARY:

People, Performance & Partnership has under spent by £80k. The overall picture has masked financial pressures in some areas such as occupational health services and Welsh language translations. Overall, the budget has been balanced by leaving some posts vacant with the work being covered by other members of the team. This has led to increased pressure and is not sustainable longer term. Plans to partner with a neighbouring authority to reduce translation costs are being taken forward during 2025-26.

Policy, Scrutiny & Customer Experience

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	19	(27)	(74)

Policy, Scrutiny & Customer Relations has underspent by £74k, this is due to:-

- **Corporate** - £28k under spent – staff management costs have been partially covered by Ukraine grant funding as capacity is diverted to manage this project.
- **Customer Relations** - £24k over spent – due to the cost of undertaking independent complaint investigations exceeding our available budget.
- **Scrutiny** - £4k over spent – due to the inability to make staff vacancy factor savings and a small overspend in supplies and services.
- **Policy & Partnerships** – £74k underspent – an improvement of £39k since update 3 – mainly due to underspends in GIS (£35k) and Community Safety (£25k) due to part year staff vacancies and a £50k saving in Performance & Data as we passported core staff costs to capital alongside an in-year vacancy saving due to a career break. These have been offset by an overspend in our corporate subscription costs of £21k and an £18k

overspend in Equalities and Welsh Language where translation demand outstripped available budget, the final overspend on translation was not as high as we originally forecast and is the main reason for the £39k improvement from update 3.

People				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	68	75	22	(6)

People Services has under spent by £6k, the main reasons are as follows:

- **Payroll & People Management** - £13k net underspend – mainly due to savings through the reduction in temporary support hours and the covering of maternity leave in-house rather than backfilling the post which has helped reduce staff spend.
- **Occupational Health** - £20k overspent – the cost of occupational health appointments exceeded the available budget due to increased volume, although overall activity was not as high as predicted in December meaning the final overspend was £11k less than reported in Update 3.
- **Corporate Training** – £44k underspent – due to income exceeding budget expectations and staff savings due to a delay in a post being filled in-year.
- **Organisational Development** - £4k over spent – Inability to meet staff vacancy savings.

LAW & GOVERNANCE DIRECTORATE (PG)	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	51	48	2	18

CHIEF OFFICER COMMENTARY:

Law & Governance has reported an £18k overspend for the 2024/25 financial year. While officers have worked diligently throughout the year to manage budget pressures within the directorate, there has been an adverse variance of £20k compared to the position reported at Update 3. This variance was outside of our control, due to a late-year VAT adjustment in Elections that was not known at the time of the previous update.

Democratic Services				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(22)	(19)	(19)	19

Democratic Services has over spent by £19k, this is due to:-

- **Members** - £4k over spent – a small over spend spread across employees (£1k) and supplies and services (£3k). This is a £25k adverse swing from Update 3 and is due to projected staff savings from vacancies and reduced co-opted member costs not materialising as expected at outturn.

- **Committee & Elections** – £15k overspent – an increase of £13k since update 3 – this is due to a minor overspend in supplies and printing costs (£2k) coupled with a late year Vat adjustment, resulting from changes in how election grant costs are recovered from central and Welsh government.

Legal and Land Charges

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'s	73	67	21	(1)

Legal and Land charges have underspent by £1k, due to:-

- **Legal Services** - £9k over spent – overspend is due to a shortfall in rechargeable income and court fees, this was offset by a part year staff saving and an underspend in supplies and services. Final income figures exceeded previous projections and is the reason for the £17k improvement from Update 3.
- **Land Charges** – £10k under spent – mainly as a result of improved income, savings from a vacant post and reallocation of IT server costs to capital.

RESOURCES DIRECTORATE

	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	18	(201)	(430)	31

DIRECTORS COMMENTARY:

The Directorate has generally seen strong financial and budgetary control throughout the year. This has benefited the wider corporate need to support budget recovery efforts. Update 4 and Outturn has however seen an adverse overall swing, with a £430k forecast under spend at month 3 moving into a £31k over spend at outturn.

This swing was caused principally by a need to make prudent provision against potential future costs in respect of its Council's commercial investment portfolio, specifically with Castlegate Business Park. Furthermore, a conscious decision has been taken in light of the Council's overall positive outturn position to fund the 24/25 SOC/SIEM cyber security cost from within the service budget rather than the IT reserve.

More generally the directorate has been able to generate and hold vacancy savings across the directorate in line with wider budget recovery efforts. Further savings have been achieved from hold backing on non-essential spend and only project work being progressed. Income generation more generally has been variable with unique one-off circumstances impacting on overall performance, coupled with out performance in some areas (e.g.

cemeteries). I am comforted at least that forecasts for 2025/26 provide a stronger outlook as tenancies take their full effect with rent free periods falling away and rent reviews and uplifts having a full year effect.

Finance

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(199)	(197)	(351)	(314)

Finance has under spent by £314k, this is mainly due to -

- **Revenues, Systems & Exchequer** - £107k net underspend:-
 - **Benefits** - £43k under spent - Housing Benefit Subsidy spend was £11k under budget (a £25k swing since update 3). This reflects the benefit applications made during the year, housing benefit subsidy received and outstanding debt at year end. In addition, there was a £32k in year saving which was a combination of additional one off grant income and managed service savings.
 - **Council Tax** - £14k over spent – there are a number of factors that make up this position. There is a £16k residual budget pressure from the Finance restructure against this cost centre. Also, the bad debt provision for court costs had to be topped up by £25k, non-pay costs incurred by the Shared Service were £8k over spent reflecting increases in printing and posting costs. However, these additional costs were partially offset by one off administration grant income of £17k from the Welsh Government and £20k additional summons fee income. The £8k improvement since update 3 is largely associated with additional summons fee income.
 - **Debtors** - £9k under spent - The underspend is due to vacancies within the team that were filled during the year.
 - **Financial Systems Support & Vat** - £53k under spent - A combination of items contribute to this underspend. The salary budget underspent by £23k due to vacancies. There was a £6k managed saving against the system maintenance and development budget as only essential work was undertaken, and recharge income was £24k more than budgeted. This income reflects the work the Team undertakes for schools and administering payments for Homes for Ukraine. The underspend has increased by £7k since update 3, as the team waited for approval to appoint to a vacancy within the Creditors Team.
 - **Revenues System Administration** - £21k over spent - The overspend reflects increased annual contract costs of £24k for the Revenues and Benefits System plus £1k of unmet budgeted employee efficiency savings, offset by £4k managed savings against the system development budget.
 - **Cashiers** - £30k under spent - A vacancy was not filled this year, generating a saving of £21k. All non-essential developments of the income system also remained on hold and generated further savings of £9k. Both these managed savings were included in the council's in year budget management plan.
- **Finance** - £193k under spent – due to full and part year staff vacancy savings.
- **Audit** – £14k under spent – staff savings due to part year vacancies.

Corporate Health & Safety

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	(4)

Corporate Health & Safety has returned a £4k under spend due to a saving in supplies & services spend.

Information, Communication & Technology

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(15)	(15)	(41)	11

The ICT division has over spent by £11k, this is due to:

- **Digital Programme Office** – £44k overspent - previously reporting an underspend due to managed savings in supplies & services but a late decision to fund the 24/25 SOC/SIEM cyber security cost from within the service rather than the IT reserve has pushed the budget into an overspend and is the reason for the adverse swing at outturn.
- **Digital Design & Innovation** - £26k under spent – because of managed staff vacancies.

Commercial & Corporate Landlord

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	232	11	(38)	338

Commercial & Corporate Landlord has over spent by £338k, due to:

- **Investment Properties** - £541k over spent, due to:–
 - **Newport Leisure Park** - £126k overspent – Newport Leisure Park generated a surplus of £220k in 2024/25 after expenses and loan repayments; however, this was £126k below the budgeted target of £346k. The variance was primarily due to changes in existing tenancy agreements, which led to reduced annual rental income. Additionally, the surrender of previous tenants resulted in increased electricity standing charges. The financial position of Newport Leisure Park is projected to improve in 25-26, due to the elimination of rent-free periods, the reduction of one off cost associated with new tenancy agreements, and a decrease in rates associated with vacant units.
 - **Castlegate Business Park** - £415k overspent – This overspend is primarily driven by two factors, £48,000 incurred as a result of heightened site maintenance costs and service charges associated with vacant units, and £367,000 due to year-end bad debt provisions. The bad debt provisions were prudently assessed to mitigate future risks. The need for these adjustments were highlighted in update 3 and have since been included, representing the main contributors to the increased overspend. If the impacts were to crystallise this is anticipated to take place during 2025/26 and 2026/27. To the extent that the impacts don't fully crystallise this benefit will be released in those future financial years.

- **Landlord Services** – £208k net under spent – mainly due to a £249k underspend in employee costs resulting from full and part year staff vacancies, offset by a shortfall in the 24/25 Property Rationalisation saving, the work to rationalise or repurpose our buildings continues and even though the full saving was not achieved in 24/25 a late improvement in rental income helped mitigate the deficit to only £45k of the original £215k saving target.
- **County Farms & Industrial units** - £138k over spent – Budgeted rental income was not fully realised due to the timing of rent review uplifts and new tenancies, many of which commenced mid-year. As a result, only a partial receipt of the anticipated additional income in 24/25 was achieved. In addition to this, we have seen an increase in expenditure due to an overspend on water rates and the additional in-year running costs of unoccupied units, these void costs were not budgeted and contributed further to the overspend.
- **Cemeteries** – £17k under spent – due to burial income exceeding budget estimates.
- **Building Cleaning & Public Conveniences** - £114k underspend, primarily due to a combination of full-year and part-year staff vacancies, as well as savings on maintenance and business rates for public conveniences. Additionally, income from external Service Level Agreements increased following a late-year rate uplift. These factors, along with further staff savings from delays in filling vacant posts, contributed to an £83k improvement compared to Update 3.
- **Property Services** – £3k net under spent – employee underspends due to part year staff vacancies have been partially offset by overspends on maintenance and rates within office accommodation.

CORPORATE COSTS & LEVIES	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	6	31	(1,607)	(3,491)
Precepts & Levies				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	3	3	(4)
Minor variances.				
Coroners Services				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4

Deficit / (Surplus) £'000s	0	12	12	12
The Coroner Service has overspent due to the urgent restructuring of the service as required by the Chief Coroner of England and Wales.				
Archives (Gwent Joint Records)				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	6	6	6	6
Final fees marginally above budgeted precept.				
Corporate Management				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	23	9	(61)
Primarily rate refunds on MCC owned properties following appeal.				
Non-Distributed Costs				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	182	209
Pension strain (enhancement) costs were above budgeted levels following decisions made by services to permit retirement earlier than the normal pension age.				
Strategic Initiatives				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	(1,766)	(3,354)
WG award of Funding in relation to support for additional NJC pay pressures that have been incurred in services.				
Insurance				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	(41)	(298)

A reduction in the provision for unsettled insurance claims made against the authority has led to an underspend at the financial year-end. This reduction in potentially payable claims could not be predicted with certainty at Update 3.

TREASURY & RESERVES		Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s		(283)	(480)	(565)	258
Interest & Investment Income					
Outturn Forecast		Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s		48	(15)	34	(137)
Cash balances were higher than anticipated in the final quarter allowing larger investments in Money Market Funds and Government deposits. This increased investment and slower than anticipated cuts to interest rates improved returns.					
Interest Payable & Similar Charges					
Outturn Forecast		Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s		(42)	(175)	(339)	(203)
Additional long term borrowing was secured during the final quarter to provide greater cost certainty over future year. This led to a short-term cost of carry which added costs in 2024/25.					
Charges Required Under Regulation					
Outturn Forecast		Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s		(41)	(41)	168	549
Additional vehicles have been disposed of in Q4 with any outstanding MRP charges provided for in year. The movement will be matched with an equal and opposite movement in Borrowing Cost Recoupment.					
Other Investment Income					
Outturn Forecast		Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s		0	(1)	(1)	(7)

Minor unbudgeted income.				
Borrowing Cost Recoupment				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(248)	(248)	(464)	(842)
Additional borrowing recoupment income was charged for any vehicles disposed of in the final quarter of the year. This improvement is matched by an opposite movement in Charges Required Under Regulation.				
Attributable Costs - Fixed Asset Disposal				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	3
Minor variance.				
Transfer to/from Earmarked reserves				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	895
This reflects year-end decisions to make additional contributions to/from earmarked reserves that were not budgeted.				
FINANCING	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(350)	(350)	(617)	(215)
Council Tax Benefit Support				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(350)	(350)	(525)	(552)
Caseload has shown a gradual reduction throughout the year as less claimants have come forward. The number of claimants was below what was envisaged when the budget was set.				
Council Tax				

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	(92)	337
Council tax income is £337k less than budgeted. The council tax base remains healthy and was ahead of the tax base set for the year. However, council tax discounts and exemptions continue to rise which has had a negative impact on the overall outturn position. Council Tax Premium: Taking account of payments made and unpaid premiums turning bad in the future, an additional £307k has been collected this financial year. This has been transferred to the Council tax premium reserve to support future housing pressures.				
General Government Grants				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	0
Income received to budget.				

3. School Balances

- 3.1. A Board of Governors who are responsible for managing the school's finances, directly governs each of the Authority's Schools. However, the Authority also holds a key responsibility for monitoring the overall financial performance of schools. Below is a table showing the forecast Schools' balances position, for each Educational Cluster.

School Reserves in £000's	(A) 2024/25 Opening Reserves (Surplus) / Deficit	(B) Draw / (Contribution) @ Update 1	(C) Draw / (Contribution) @ Update 2	(D) Draw / (Contribution) @ Update 3	(E) Draw/ (Contribution) @ Outturn	(A+E) 2024/25 Year-end Deficit
Cluster						
Abergavenny	143	1,133	1,278	1,592	1,207	1,351
Baldicot	(87)	1,152	776	775	49	(37)
Chepstow	658	800	949	804	330	989
Monmouth	(552)	1,066	1,165	1,180	696	144
Pupil Referral Service	741	778	719	889	906	1,645
Total	904	4,929	4,887	5,240	3,187	4,092

- 3.2. Collective School balances at the beginning of the Financial Year amounted to a deficit of £903,636. The anticipated further draw on reserves at Update 1 was £4,928,604, against a budgeted draw on reserves of £5,015,104, which resulted in a forecast deficit balance of £5,832,251 by year end. At Update 2, the draw on reserves had reduced slightly, however at Update 3, the draw on reserves has increased to £5,240,192, resulting in a forecast deficit balance of £6,143,839 by year end. The outturn draw on reserves is £3,188,083 leaving an overall deficit reserve for schools of £4,091,731

3.3. The movement of individual schools forecast to be in deficit at the end of the year is shown below:

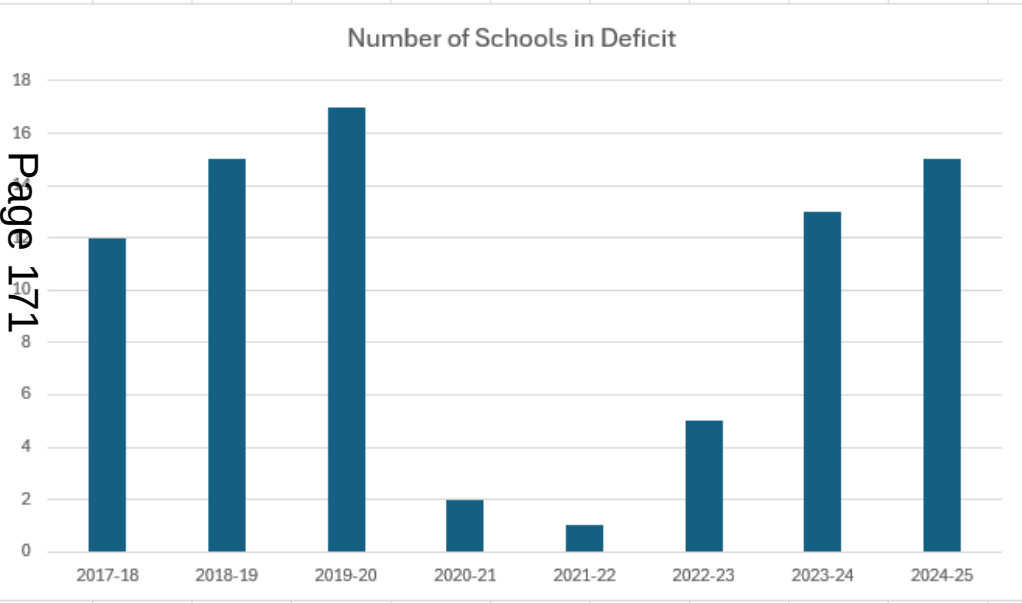
Start of year	Update 1	Update 2	Update 3	Update 4
Total: 13	Total: 19	Total: 20	Total: 24	Total: 15
Chepstow School	Chepstow School	Chepstow School	Chepstow School	Chepstow School
Pupil Referral Service	Pupil Referral Service	Pupil Referral Service	Pupil Referral Service	Pupil Referral Service
The Dell	The Dell	The Dell	The Dell	The Dell
Our Lady & St Michael's RC Primary School (VA)	Our Lady & St Michael's RC Primary School (VA)	Our Lady & St Michael's RC Primary School (VA)	Our Lady & St Michael's RC Primary School (VA)	Our Lady & St Michael's RC Primary School (VA)
Ysgol y Fenni	Ysgol y Fenni	Ysgol y Fenni	Ysgol y Fenni	Ysgol y Fenni
Caldicot School	Caldicot School	Caldicot School	Caldicot School	Caldicot School
Ysgol y Ffin	Ysgol y Ffin	Ysgol y Ffin	Ysgol y Ffin	Ysgol y Ffin
Osbaston	Osbaston	Osbaston	Osbaston	Osbaston
Overmonnow	Overmonnow	Overmonnow	Overmonnow	Overmonnow
Gilwern	Gilwern	Gilwern	Gilwern	Gilwern
Rogiet	Rogiet	Rogiet	Rogiet	Rogiet
Thornwell	Thornwell	Thornwell	Thornwell	Thornwell
King Henry VIII 3-19 School	King Henry VIII 3-19 School	King Henry VIII 3-19 School	King Henry VIII 3-19 School	King Henry VIII 3-19 School
	Goytre Fawr	Goytre Fawr	Goytre Fawr	
	Llantilio Pertholey	Llantilio Pertholey	Llantilio Pertholey	
	Dewstow		Dewstow	

	Monmouth Comprehensive	Monmouth Comprehensive	Monmouth Comprehensive	
	Llandogo	Llandogo	Llandogo	
	Usk	Usk	Usk	
		Castle Park	Castle Park	
		Cross Ash	Cross Ash	
			Ysgol y Trefynwy	Ysgol y Trefynwy
			Undy	
			Kymin View	Kymin View

- 3.4. The legacy impact of the pandemic continues within the school environment, particularly in respect of attendance, behaviours and increased additional learning needs. This has required increased staff and specialist resources to tackle the issues presenting and increased overall costs of provision. Higher than budgeted pay awards have also impacted upon budgets.
- 3.5. All schools that are budgeting to register a deficit balance at the end of the 2024/25 financial year are required to bring forward budget recovery plans. These recovery plans will be confirmed with both the Local Education Authority, each School's Governing Body and, in some cases, the plans will need to be agreed by the relevant Cabinet Member. All recovery plans are currently being reviewed, and where required, further support being given.

Financial Year-end	Net level of School Balances (Surplus) / Deficit in £000's
2015-16	(1,156)
2016-17	(269)
2017-18	(175)

2018-19	232
2019-20	435
2020-21	(3,418)
2021-22	(6,956)
2022-23	(4,257)
2023-24	904
2024-25	4,092



4. Capital budget Outturn

4.1. The summary Capital outturn position is as follows:

	Slippage B/F	Original Budget	Budget Adjustments	Slippage to 2025/26	Revised Budget 2024/25	Actual Outturn	Variance to budget at Outturn
	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Expenditure							
Capitalisation Directive	387	3,358	0	(63)	3,682	3,682	0
Development Schemes Over £250k	8,222	100	5,717	(9,083)	4,956	4,699	(257)
Development Schemes Under £250k	2,013	590	926	(3,304)	225	1,503	1,278
Schools & Education	8,604	19,507	(8,784)	(33)	19,294	19,294	0
Infrastructure	3,250	6,345	497	(3,958)	6,134	5,330	(804)
ICT Schemes	765	303	126	(272)	923	687	(236)
Property Maintenance	1,279	2,139	739	(667)	3,490	2,717	(773)
Renovation Grants	110	900	379	(192)	1,197	1,197	0
Low Cost Home Ownership	27	0	148	0	175	175	0
Section 106	1,156	0	656	(1,454)	358	358	0
Specific Grant Funded	2,795	500	10,889	(6,009)	8,175	8,167	(8)
Vehicle Leasing	0	1,500	60	0	1,560	930	(630)
Fixed Assets Purchased from Revenue	0	0	68	0	68	68	0
Total Expenditure	28,606	35,242	11,423	(25,033)	50,238	48,806	(1,430)
Financing							
Supported Borrowing	0	(2,436)	0	0	(2,436)	(2,436)	0
General Capital Grant	0	(2,502)	0	0	(2,502)	(2,502)	0
Grants and Contributions	(3,596)	(13,850)	(15,577)	8,860	(24,163)	(24,164)	0
S106 Contributions	(1,121)	0	(1,065)	1,621	(565)	(565)	0
Unsupported Borrowing	(22,325)	(10,554)	5,338	13,661	(13,880)	(14,583)	(703)
Earmarked Reserve & Revenue Funding	(148)	(253)	(166)	272	(295)	(282)	13
Capital Receipts	(1,415)	(4,148)	47	619	(4,897)	(4,275)	622
Leasing	0	(1,500)	0	0	(1,500)	0	1,500
Total Financing	(28,606)	(35,242)	(11,423)	25,033	(50,238)	(48,806)	1,430

4.2. The capital expenditure at outturn showed a net under spend £1,430,000. This was due to the following schemes:

Scheme	Budget	Over / (Under) spend	
Infrastructure	10,092	(804)	The total infrastructure budget for the year was £10m. £5.3m of this was spent in year, with a further £3.9m being carried forward to 2025/26 to complete specific works. The remaining budget of £804k will not be carried forward and will instead be repurposed in 2025/26 as a contingency budget to mitigate capital budget risks developing.
Property Maintenance	4,158	(773)	The total budget for the maintenance of assets for the year was £4.1m. £2.7m of this was spent in year, with a further £667k being carried forward to 2025/26 to complete specific works. The remaining budget of £733k will not be carried forward and will instead be repurposed in 2025/26 as a contingency budget to mitigate capital budget risks developing.
Vehicle Leasing	1,560	(630)	Expenditure required for the replacement of vehicles was lower than the anticipated budget following full assessment of service needs.
IT Schemes	1,194	(236)	System upgrades and Network replacement budgets have not been fully utilised in year and formed part of the re-purposing of budget as part of the 2025/26 budget build.
Crick Road Care Home	0	(166)	Final retentions lower than anticipated.
Other schemes	58,267	(121)	Minor underspends across a number of schemes that reflect variances in the final scheme costs.
Capital contingency fund	0	1,300	£1.3m of released budgets will be carried forward to 2025/26 as a contingency budget to mitigate capital budget risks developing in year. This can either be on schemes already in progress and facing additional cost pressures, or to meet new risks that were not foreseen at budget setting stage.
Total	75,271	(1,441)	

4.3. Capital Slippage

4.4. Capital slippage for the year was £25.032 million. Schemes reporting slippage are:

Scheme	Slippage £000's	Comment
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ATF Core Llanfoist Bridge & Meadow Links	4,368	Slippage required to align with revised scheme programme of works as agreed with the grant awarding body
Welsh Medium School and Nursery	2,696	Slippage required to align with revised scheme programme of works as agreed with the grant awarding body
Wye Bridge Monmouth	2,166	Initial phases of work were pushed back to allow wider programme of resurfacing works to be carried out within the area. These works faced delays due to external issues with third parties, which has meant that a revised schedule of works is required for Wye Bridge. Whilst some initial design and feasibility works will be carried out within 2025/26, it is recommended that this budget is slipped forward to 2026/27 to align with the revised schedule.
Capital Capital Region City Deal	1,948	Re-profiling of contributions as required by the programme of works delivered by the South East Wales Corporate Joint Committee
Property Acquisition for Children and Young People with Complex Needs	1,867	Multi-year scheme which relies on suitable properties being identified to match demand requirements
Asset Investment Fund	1,781	Remaining budgeted designated to cover any ongoing capital expenditure required on investment properties. This allocation ensures that sufficient funds are available to address maintenance, improvements, and other capital-related expenses, thereby safeguarding the value and functionality of our investment assets.
Housing Provision Borrowing Headroom	1,421	Acquisition strategy in development to formalise arrangements in respect of buying properties to address homeless issue & support the implementation of our Rapid Rehousing Transition Plan 2025-26.
Capital contingency fund	1,300	£1.3m of released budgets will be carried forward to 2025/26 as a contingency budget to mitigate capital budget risks developing in year. This can either be on schemes already in progress and facing additional cost pressures, or to meet new risks that were not foreseen at budget setting stage.
Carriageway Resurfacing	648	Contractor workload, has led to delays on planned works that will be completed in 2025-26
Flood Recovery Grant	595	Wye Bridge Resurfacing project was due to start in March but was put on hold as WG were undertaking works on the A40 in Monmouth so was pushed forward to April to accommodate - funding needs to be slipped in order to pay for the works.
Placemaking programme	412	Slippage due to Town Council / SPF contributions received, therefore required for 2025/26 applications against this scheme which require match funding.

Property Maintenance	387	Required for essential schemes delayed by contractor engagement
Reconstruction of Bridges and walls	352	Re-surfacing works delayed on Wye Bridge project. No compliant bids were received in the first tender process so have to go back out to tender and this will take us into the 2025/26 financial year.
RE:FIT Programme	292	Funding needed to pay for the outstanding costs on phase 1 including retention payment along with M&V (external monitoring and verification reporting) and O&M (ongoing maintenance and remote monitoring costs) that were capitalised as part of the Salix funding application business case.
NHLF Woodland Investment Grant	248	Due to unforeseen delays caused by contractors, it is necessary to defer the grant funding to finalise the scheme in 2025-2026.
Clydach Gateway Reinstatement and Devil's Bridge Associated Works A465	248	The grant funding will need to be deferred to the 2025-26 to complete the project, as agreed with the grant awarding body.
Shire Hall/Monmouth Museum	234	The Shirehall budget will need to be deferred, as agreed at the Business Cabinet on 20.05.2025, to partially finance the delivery stage of the project, subject to the outcome of the NHLF bid.
School Refurbishment	229	Delays in contractor engagement for urgent essential maintenance. Projects planned for 2025-26, and some have commenced.
Disabled Facilities Grants (Private)	192	Late unplanned grant has produced an underspend, which is requested to slip forward to invest in further works. We currently have 75 open referrals for vulnerable people who are in desperate need of an adaptation. We have already committed a large portion of this year's budget already, and so, any new applications we get from now onwards may have to wait until next year for delivery. This is having a negative effect not only on peoples' lives but also impacts Social Care and Health. The slippage will allow us to continue the DFG programme in earnest and try to make inroads into clearing the backlog and meeting our own internal targets and Welsh Government targets for delivering DFGs
Trellech Primary Nursery Childcare Scheme	191	Completion of Nursery scheme to be completed in 2025-26, as improvement works have commenced

Wye Bridge Chepstow	190	Scheme is shared with Glos C.C. - material sampling and testing works (£50k) are currently on hold as we are waiting on the results of a study being undertaken by SWTRA/TFW on the adjacent trunk road network that could influence what we need to do on the bridge
Solar Farm Development Cost	150	No progress was made in 2024-25 due to the uncertainty of availability of grid connections and the use for the energy generated. In addition, there was uncertainty over the service provider we were intending to use and the impact of the delay in the replacement LDP. Works will now be started in 2025/26 as scheme needs to progress alongside the RLDP
Depots – Feasibility works: Transport Depot South of County	149	Consultants have been commissioned to undertake the design and feasibility works. Initial discussions have taken place; however, progress has been stalled due to the amended timescale for the RLDP, health and safety priority works in existing depots and capacity issues. The replacement depot remains a key requirement to facilitate fleet transition and consolidate operations.
RS Data Hall Migration	149	Decommissioning work did not start in earnest until late March, Torfaen have confirmed works will be completed this year so funding needs to be slipped.
Decarbonisation Investment / Surveys	144	Due to capacity issues, schemes delayed in delivering decarb investment projects, although progress was made with pool covers through MonLife. Surveys will be undertaken across our properties so further schemes will be identified.
Grant Match Funding Support Allocation / Schemes	136	Progress of schemes dependent upon identifying suitable grant streams, so reliant upon third parties. Slippage is to be repurposed to fund 2025/26 programme
MUCH Project (Magor with Undy Community Hall)	135	Final fitting out stage to be completed in 2025-26
Depot H&S Improvements	113	Work will be completed in 2025-26
Mounton House Refurbishment	104	Work will be completed in 2025-26
Footway Reconstruction	103	Work will be completed in 2025-26
Social Care Case Management System Replacement	98	Grant received during the year has allowed core budget to be carried forward and assessed as part of overall project costs.
Various small schemes	79	Small PROW schemes, Safety Fence upgrades, Signage upgrades and disabled facilities

Capitalisation Directive	63	Minor shortfall in qualifying spend which will be committed in 2025/26
Ash Dieback/Dangerous Trees works	58	This scheme is continuing into 2025-26 as affected woodland is identified
County Farms Maintenance & Reinvestment	51	Funding required for slurry lagoon works as a result of change in regs. Extra works to be carried out on two barns in 25/26 Insurance claim may not be successful for MCC due to poor maintenance.
Projects to Safely and Effectively Open Schools to the Community Outside Traditional Hours	49	Projects started and will be completed in 2025-26 as opportunities allow
Access for All	48	Slippage required to complete existing improvement programme
NLCF RUR2 Llanelly Hill Hub Project	45	Slippage required to complete scheme in 2025-26, contracts already agreed and work part complete.
Monmouth Leisure Centre/Pool Redesign	33	The funding will need to be deferred to cover the works that have been completed at Monmouth LC.
Brilliant Basics Fund – WG- Tintern Welcome	31	Due to unforeseen delays caused by contractors, it is necessary to defer the grant funding to finalise the scheme in 2025-2026.
SharePoint Online Implementation	24	Slippage required to ensure all costs of implementation have been met fully in year.
ATF - Caldicot Greenway	20	Scheme due for completion early 2025-26 due to slight delays out of Council control
Monmouth Sportsground Sport Courts Installation - SW	19	Due to unforeseen delays caused by contractors, it is necessary to defer the grant funding to finalise the scheme in 2025-2026.
Other Small Schemes	11	Work will be completed in 2025-26
S106 Schemes	1,454	Delays in planning / public consultations and contractor engagement, have led to delays on various schemes

4.5. Useable Capital Receipts Available

- 4.6. The table below outlines the latest forecast of capital receipts balances available to meet future capital commitments. The full balance of capital receipts is committed to future capital investment meaning there is little scope to support additional capital investment. This also means that the level of capitalisation direction support is profiled to taper down to zero over the medium term.

Capital receipt balances	2024/25	2025/26	2026/27	2027/28	2028/29
	£000's	£000's	£000's	£000's	£000's
Balance as at 1st April	9,984	6,082	4,033	1,877	422
Capital receipts used for financing	(418)	(557)	(50)	(50)	(50)
Capital receipts used to support capitalisation direction	(3,682)	(3,770)	(2,708)	(1,708)	0
Capital receipts Received	198	0	0	0	0
Capital receipts Forecast	0	2,278	603	303	0
Forecast Balance as at 31st March	6,082	4,033	1,877	422	372

Budget savings performance 2024-25

Appendix 2

	Savings proposals by Directorate	Budgeted Saving	Outturn	Variance to Budgeted Savings	Percentage met	Comment
			£000	£000		
	Social Care & Health	(4,972)	(3,650)	1,322	73.4%	
	Learning, Skills and Economy	(3,172)	(3,103)	69	97.8%	
	Infrastructure & Place	(927)	(470)	457	50.7%	
	Customer, Culture and Wellbeing	(1,079)	(961)	118	89.1%	
	People, Performance and Partnerships	(86)	(86)	0	100.0%	
	Law & Governance	(33)	(33)	0	100.0%	
	Resources	(595)	(548)	47	92.1%	
	Corporate Costs & Levies	(77)	(77)	0	100.0%	
	Totals	(10,940)	(8,928)	2,013	81.6%	

Ref	Social Care & Health	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		
SCH3/4	Childrens services - Placement and Practice Change - Reviewing high-cost placements and developing in house placement	(1,300)	(1,197)	103		Savings to date of identified placements totals £1M
SCH2/5/7/16	Adults services - Directorate staffing review - reducing the workforce within adult services	(1,464)	(1,464)	0		

SCH6/8/9/10/14/15	Adults services - practice change agenda by managing demand, strengthening oversight and controlling costs	(1,130)	(292)	838		Review work is ongoing and we are looking at a plan to introduce some short term additional resource to accelerate this area of work. In addition, we are still actively pursuing CHC opportunities as they arise
SCH11	Adults services - Reduction in Adult partnership arrangements for Gwent service delivery models - Shared lives, Emergency duty, Frailty, Regional partnership team	(55)	(49)	6		We negotiated with Caerphilly CBC who host a regional Shared Lives partnership a £49K refund on built up reserves by Caerphilly from years of unspent partner funding.
SCH12	Adults services - Transformation Team structure - reduction in core workforce	(30)	(30)	0		
SCH13	Adults services - Savings from service relating to borrowing to afford Severn View replacement	(105)	(105)	0		
SCH18	Review and increase of directorate schedule of fees and charges across Social Care & Health	(388)	(388)	0		
SCH19	Public protection - Hold vacant Environmental Health Officer post	(23)	(23)	0		
Energy	Year-on-year change in energy cost	(102)	(102)	0		
SCH17	Review the legal non residential weekly charge cap from £100 to £120	(375)	0	375		WG not progressing
	SCH Totals	(4,972)	(3,650)	1,322		
Ref	Learning, Skills and Economy	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		

CYP2	CYP support - Release expected reserve from rebates for solar panel on schools	(120)	(51)	69		Solar panels not generating the expected budgeted income
CYP3	CYP Support - Freeze vacancy in student access team	(34)	(34)	0		
CYP4	Net saving on ALN placements. Reduce the cost of out-of-county and specialist placements by investing in the quality and capacity of local, community and specialist resource basis.	(534)	(534)	0		Receipt of a WG grant, plus a number of ALN pupils leaving Independent Schools and the costs for ALN pupils receiving EOTAS (Education Other Than At School) Bespoke packages, not being as much as previously forecast has resulted in the net savings being achieved
CYP5	ALN & Standards - Continue to hold a vacancy open in the Most team	(20)	(20)	0		
CYP6	ALN & Standards - Reduction in Education Achievement Service contribution of 10%	(35)	(35)	0		
CYP7	Stop contributions to Gwent Music, leaving hardship fund in place	(39)	(39)	0		
CYP8	Increase Breakfast club charges	(70)	(70)	0		
Energy	Year-on-year change in energy cost	(820)	(820)	0		
CORP2	Teachers pension grant funding	(1,500)	(1,500)	0		
	LSE Totals	(3,172)	(3,103)	69		
Ref	Infrastructure & Place	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		
C&P1	Savings from the disposal of street sweepings through Siltbuster recycling plant	(20)	(20)	0		
C&P2	Fees & charges - Uplift in garden waste collection costs 10%.	(75)	(75)	0		

C&P3	Waste and street services - Restructure to reduce staff costs and not replace frozen post	(50)	(50)	0		
C&P5	Reduce EPA numbers to reflect uptake of Town Team approach	(25)	(25)	0		
C&P6	Remove Council Car	(8)	(8)	0		
C&P10	Review the provision of small vehicle home to school transport contracts with a view to bringing in house	(93)	(93)	0		
C&P11	Increase the cost of concessionary transport seats from £440 to £484 (10% uplift)	(3)	(3)	0		
C&P12	Decarbonisation - Increase renewable energy generation opportunities across our estate to reduce demand on grid supply	(50)	(50)	0		
C&P14	Planning income target increased	(50)	0	50		Not Achieved - income target not reached due to a reduction in planning applications driven by the undertainty around the economy.
C&P16	Fees & Charges - Increase fees by 10% for street naming and numbering, licences, road closures and S.38 inspections	(33)	(33)	0		
C&P18	10% Uplift in Car Parking Charges	(66)	(66)	0		
C&P20	Fees & charges - Increase SAB pre-application charges by 10% and increase the income target to reflect increased service uptake	(2)	(2)	0		
C&P21	Fees & Charges - Increase SAB application budgeted income target by £25k each year for the next two years	(25)	(18)	7		Partially achieved - reduced applications resulted in only £18k of the £25k target being achieved.
Energy	Year-on-year change in energy cost	3	3	0		

C&P22	Fees & Charges - Trade waste fees, sale of bags & bins etc... 10%	(30)	(30)	0		
C&P23	Homelessness - Rapid rehousing transition - reduce the number in unsuitable and costly accommodation	(400)	0	400		Not Achieved - occupancy will not start until new financial year due to planning permission delay. This pressure was part offset by windfall grant funding within the wider Housing budget.
	I&P Total	(927)	(470)	457		
Ref	Customer, Culture and Wellbeing	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		
ML1	Realign services within the Town/Market Hall in Abergavenny to improve their potential and ensure continued service delivery	(20)	(20)	0		
ML2	Museums - Close Abergavenny and Chepstow museums an additional day a week and review business support	(40)	(10)	30		Delayed restructure has lead to the sections inability to achieve the full savings , restructure has been completed Jan 2025. Overall savings shortfall has been off set by additional income in Monlife.
ML3	Close Old Station Tintern for one day a week on Mondays from 1st April 2024, except for four bank holidays	(10)	(10)	0		
ML4	Attractions - To use £60k from SPF grants for 2024/25 to cover core staffing whilst delivering Todays' Heritage Tomorrow and Creative Futures.	(60)	(60)	0		

ML5	Countryside & Culture - Additional income for additional project management and project delivery costs from grants assumption of £25k	(25)	(25)	0		
ML6	Countryside Access Income Generation - realign the Countryside Access team to maximise the ability to recover project management and related costs from project budgets and increase income generation.	(35)	(35)	0		
ML7	Countryside & Culture - Stop contributing to Abergavenny TIC as part of Market Hall reconfiguration.	(10)	(10)	0		
ML8	Countryside & Culture – Recover officer time and project management costs directly associated with the delivery of section 106 funded green infrastructure and recreation schemes.	(15)	(15)	0		
ML9	Leisure, Sports & Outdoor Adventure - Move to cost neutral services, creating a multi-function site with re-engage PRU and social services	(70)	(70)	0		
ML10	Leisure centres - Change closing times - Weekday Closing 21:30 weekend closure 16:30	(140)	(140)	0		
ML11	Reduced Youth club provision - Explore alternative delivery models for open access youth provision, including community youth clubs	(20)	(20)	0		

ML12	Marketing and Memberships Service Redesign - achieve efficiencies by realigning services between departments, reviewing and realigning posts and enhancing the front-of house software provision for collecting membership payments.	(50)	(50)	0		
ML13	High level management restructure – Area management model	(120)	(32)	88		In progress, delay to structure implementation due to consultation - Income generation in leisure has offset shortfall in staffing savings
Energy	Year-on-year change in energy cost	(437)	(437)	0		
F&C's	Increase in fees and charges for discretionary services in line with the increase costs of delivering these services	(27)	(27)	0		
Page 185	CCW total	(1,079)	(961)	118		
Ref 185	People, Performance and Partnerships	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		
CEO2	Policy - Training & Workforce Development - Staffing re-alignment (£65k) Partnership working in online training delivery (£10.5k)	(76)	(76)	0		
CEO3	Payroll & HR - Release of contingency budgets for implementation of e-recruitment	(10)	(10)	0		
	PPP Totals	(86)	(86)	0		

Ref	Law & Governance	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		
LG2	Vacancy Freeze - Paralegal post	(33)	(33)	0		
	LG Totals	(33)	(33)	0		
Ref	Resources	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		
RES1	Commercial Investments – Reversal of income pressure to reflect the forecast improvement in rental income across the commercial investment portfolio (excludes NLP and Castlegate)	(208)	(162)	46		Income target was not fully realised due to the timing of rent review uplifts and new tenancies, many of which commenced mid-year.
RES2	Income - industrial units, cemeteries, County farms - consistently exceeded their income targets over the last number of years, so budgets are being increased to reflect this	(100)	(100)	0		
RES3	Property services - Gwent police collaboration - Increasing Income to reflect projections	(50)	(50)	0		
Energy	Year-on-year change in energy cost	(220)	(220)	0		
RES5	SRS Contribution reduction following identification of efficiency savings	(17)	(16)	1		
	Resources Totals	(595)	(548)	47		

Ref	Corporate Costs & Levies	Total Saving / Recovery	Outturn	Variance		Comment
		£000	£000	£000		
CORP3	Fire SCAPE pension	(77)	(77)	0		
	Corporate Costs & Levies Totals	(77)	(77)	0		

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Appendix 3 - Capitalisation directive 2024/25

Directorate	Expenditure	Justification to capitalise	Amount £000s
I&P	PTU Software - Route/pupil optimisation.	Driving a digital approach	22
LSE	System software implementation	Driving a digital approach	84
RES	Implementing digital design & innovation	Driving a digital approach	404
	Sub-Total Driving a digital approach		509
All	Capitalisation of redundancy costs - non-schools	Funding the cost of service reconfiguration	284
All	Capitalisation of Pension Strain linked to redundancies	Funding the cost of service reconfiguration	350
I&P	Investment in Decarbonisation team	Funding the cost of service reconfiguration	106
LSE	Capitalisation of redundancy costs -schools	Funding the cost of service reconfiguration	256
I&P	Transport - Move to electric/Hydrogen fleet	Funding the cost of service reconfiguration	141
RES	Waste - Service Transformation costs	Funding the cost of service reconfiguration	794
I&P	Homelessness Prevention Project	Funding the cost of service reconfiguration	200
SCH	Supported Living project	Funding the cost of service reconfiguration	90
PPP/LG	Improvement & organisational development team	Funding the cost of service reconfiguration	303
	Sub-Total Funding the cost of service reconfiguration		2,523
SCH	Joint Local authority working (GWICES, Sc. 33, Frailty, regional safeguarding board, Gwent foster fee harmonisation and care home pooling	Integrating public facing services across two or more public sector bodies	166

I&P	Contribution to the City Deal partnership	Integrating public facing services across two or more public sector bodies	79
I&P	Passenger Transport - Sharing Senior Management with Newport CC	Integrating public facing services across two or more public sector bodies	42
SCH	Deprivation of liberty safeguards	Integrating public facing services across two or more public sector bodies	86
	Sub-Total Integrating public facing services across two or more public sector bodies		373
I&P	Procurement SLA with Cardiff	Sharing back-office and administrative services	277
	Sub-Total Sharing back-office and administrative services		277
	Total		3,682

Appendix 4 - Movement in individual school balances

School reserve balances (Surplus) / Deficit	At 31st March 2023	In Year Movement	At 31st March 2024	In Year Movement	At 31st March 2025
	£	£	£	£	£
Comprehensives					
Caldicot	(227,499)	579,936	352,437	(85,181)	267,256
Chepstow	352,451	500,587	853,038	277,952	1,130,990
King Henry VIII	(785,180)	785,180	0	0	0
Monmouth	(599,192)	369,535	(229,657)	197,735	(31,922)
Sub Total Comprehensives	(1,259,420)	2,235,237	975,817	390,507	1,366,324
Middle					
King Henry VIII 3-19	0	329,197	329,197	1,056,972	1,386,169
Sub Total Middle	0	329,197	329,197	1,056,972	1,386,169
Primaries					
Archbishop R Williams	(31,060)	4,239	(26,821)	(55,323)	(82,144)
Cantref	(196,350)	85,933	(110,417)	8,922	(101,495)
Castle Park	(105,297)	30,251	(75,046)	56,304	(18,742)
Cross Ash	(101,453)	42,986	(58,467)	43,790	(14,677)
Deri View*	(26,326)	26,326	0	0	0
Dewstow	(275,059)	217,499	(57,560)	51,255	(6,305)
Durand	(55,199)	(3,506)	(58,705)	(34,692)	(93,397)
Gilwern	(151,764)	174,688	22,924	(7,206)	15,718
Goytre Fawr	(72,125)	64,781	(7,344)	(36,302)	(43,646)
Kymin View	(88,378)	11,511	(76,867)	140,353	63,486
Llandogo	5,941	(23,596)	(17,655)	10,243	(7,412)
Llanfoist	(171,434)	45,949	(125,485)	37,865	(87,620)
Llantilio Pertholey	(72,714)	11,966	(60,748)	(14,015)	(74,763)
Llanvihangel Crucorney	(119,219)	22,353	(96,866)	13,258	(83,608)
Magor Vol Aided	(215,776)	54,257	(161,519)	(44,605)	(206,124)
New Pembroke Primary	(203,307)	32,231	(171,076)	(96,968)	(268,044)
Osbaston Church in Wales	(12,750)	86,238	73,488	(9,680)	63,808
Our Lady's & St Michael's Catholic Primary	17,078	4,177	21,255	32,634	53,889
Overmonnow	(7,662)	132,066	124,404	130,825	255,229
Raglan	(195,485)	20,104	(175,381)	14,092	(161,289)
Rogiet	(21,439)	86,860	65,421	103,791	169,212
Shirenewton	(185,338)	55,395	(129,943)	(974)	(130,917)
St Mary's (Chepstow)	(95,024)	25,021	(70,003)	(360)	(70,363)
The Dell	23,912	57,082	80,994	77,188	158,182
Thornwell	(4,257)	99,447	95,190	73,593	168,783
Trellech	(157,692)	57,639	(100,053)	7,524	(92,529)
Undy	(167,025)	25,516	(141,509)	(703)	(142,212)
Usk CV	(268,295)	176,876	(91,419)	72,307	(19,112)
Ysgol Gymraeg Y Fenni	(20,789)	191,254	170,465	115,614	286,079
Ysgol Gymraeg Y Ffin	(52,678)	69,341	16,663	58,553	75,216
Ysgol Gymraeg y Trefynwy	0	0	0	88,855	88,855
Sub Total Primaries	(3,026,964)	1,884,884	(1,142,080)	836,139	(305,941)
Other					
Pupil Referral Unit	30,707	711,453	742,160	903,018	1,645,178
Sub Total Other	30,707	711,453	742,160	903,018	1,645,178
Total	(4,255,677)	5,160,771	905,094	3,186,636	4,091,730

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Appendix 5 - Capital Budget Revisions – Grants and contributions

During the 2024/25 financial year, the Council has received a number of new grants and external contributions that weren't included in the original capital budget approved at the start of the year.

According to the Council's financial rules, any changes to the capital budget that are fully funded by grants or outside contributions must be approved by Cabinet.

This report outlines the changes that now need Cabinet approval. These changes are either:

- New grants or contributions that have been received, or
- Adjustments to existing grants or contributions that were already part of the budget. This could be due to final grant allocations being lower/higher than indicative values, or if the timing of expenditure differs to the grant timings.

Scheme Category	Scheme	Budget revision
Asset Management Schemes	Property Acquisition for Children and Young People with Complex Needs	1,172,474.46
	County Farms Maintenance & Reinvestment	149,210.43
	School Refurbishment Grant	274,789.57
	Schools Repair & Maintenance Grant	976,787.24
School Development Schemes	S106 Castle Park Primary Remodelling Works 2023-24	439,286.00
	Trellech Primary Nursery Childcare Scheme A9480	519,709.00
	Archbishop Rowan Williams Primary School Nursery	-590,000.00
	Welsh Medium School and Nursery	2,776,699.00
	Capital Support for Learners with ALN	488,394.66
	Early Years – Childcare Capital Funding	380,000.00
	King Henry VIII - Future Schools Tranche B	-3,505,090.87
	S106 - King Henry VIII - Future Schools Tranche B	195,000
ICT Schemes	Social Care Case Management System Replacement	97,891.84
	WG -Broadband Fund for the Llanthony Community Scheme	-8,189.22
	Upgrade of CAPITA 1 system CYP	55,000.00

Scheme Category	Scheme	Budget revision
Inclusion	Shire Hall/Monmouth Museum Move	275,235.28
	Disabled Facilities Grants (Private)	220,643.00
	Enable – Support for Independent Living WG	158,339.18
Infrastructure & Transport	Safer Routes in the Community	138,490.43
	LTF Severn Tunnel Junction Improvements 2019-20	280,000.20
	Vinegar Hill Development Undy CCR	4,650.00
	Road Safety Capital Grant	163,800.00
	20 MPH Capital Grant	40,000.98
	RRF - A466 Wyndlciffe Rock Stabilisation	50,116.00
	RRF - A4136 Staunton Road Stabilisation	349,532.99
	Local Transport Fund	569,000.00
	Clydach Gateway Reinstatement and Devil's Bridge Associated Works A465	250,000.00
	Woodside Usk Flood Alleviation Scheme Grant	77,181.00
	Recycling Vehicles and Boxes	34,967.40
	Repair Reuse fund -WASTE	-16,160.55
	SPF – Abergavenny Market Hall	39,313.09
Other Schemes	ATF - Caldicot Greenway	751,825.34
	ATF Core Llanfoist Bridge & Meadow Links	4,615,924.00
	ATF - Monmouth Wye AT Crossing	210,301.34
	ATF - Monmouth Kingswood Gate AFL	49,766.82
	WG – Resilient Roads Fund Grant	6,593.83
	UK Gov - Levelling Up Fund	5,000.00
	ATF Bridge Connections	-67.5
	Housing Provision Borrowing Headroom	564,437.00
	ATF – Caldicot Education and Leisure Access	884,944.66
	ATF – Multi-User Route	281,465.18
	ATF – ATNM Dropped Kerbs and Quick Wins	185,024.50

Scheme Category	Scheme	Budget revision
	B4245 Magor/Undy to Rogiet	-210,540.00
	Grant –Match Funding Support Digital Twin - Operational Dept/ ZE Vehicles	-150,000.00
	Grant –Match Funding Support Auxiliary Power - To provide a zero emissions solution to the provision of meals on wheels vehicles with an auxiliary load requirement	-75,060.00
	Monmouth STP Replacement (Sport Wales / WG)	118,366.62
	Flood Recovery Grant 2020 - 23	217,854.20
	Mardy Park Minor Works - ABUHB	-90,050.00
	Placemaking Grant programme	585,056.65
	7-43 Newport Road, Caldicot: development	-71,000.00
	UKSPF -Monmouthshire Circular Economy	9,349.58
	UKSPF - Don't Mess with Monmouthshire	78,111.83
	ATF – Core Chepstow	100,000.00
	ATF – Core Usk School	86,381.05
	ATF – Core Gilwern School	109,574.40
	ATF – Core Counters	20,205.00
	AFT – Core Pavements	48,922.00
	Monmouth Sportsground Sport Courts Installation - SW	116,500.00
	Coal Tip Safety Grant - WG	90,245.00
	NLCF RUR2 Llanelly Hill Hub Project	144,500.00
	UKSPF – Inclusive Community Spaces	166,886.49
	UKSPF – Caru Cymru	26,339.98
	UKSPF – Todays Heritage Tomorrow	7,546.00
	UKSPF – Gwent Green Grid	55,500.03
	UKSPF – Creative Futures	26,672.82
	UKSPF – Destination Monmouth	50,292.45
	UKSPF – Chepstow All Ability Outdoor Activity Space	136,104.00
	UKSPF – External Projects	429,995.41
	Granicus UKSPF	10,000.00
	UKSPF – L.C. Environmentally Friendly Chlorine Creation	130,000.00
	UKSPF – Creativity Connected	35,341.33
	Electric Vehicle Charging Infrastructure - County Hall	27,509.54

Scheme Category	Scheme	Budget revision
	Electric Vehicle Charging Infrastructure – Raglan Depot	18,753.41
Regeneration Schemes	S106 – Clydach Ironworks Enhancement Scheme	-205,378.68
	S106 - Cas Troggi Play Area, Caldicot	95,000.00
	S106 – Church Farm (3) Beneficiary Sites	144,456.00
	S106 - Rockfield View Play Area, Undy	24,629.00
	S106 - Additional recreation land at Knollbury	33,000.00
	S106- Mardy Playing Field - play improvements	120,000.00
	S106 - Bailey Park play area remedial works	13,230.00
	MF – Tudor Road Drainage Monmouth	-4,000.00
	Local Places for Nature	284,293.66
	NHLF Woodland Investment Grant	250,000.00
Vehicle Program	Leasing - Home To School Transport	59,939.65
Grand Total		16,676,813.70



SUBJECT:	MEDIUM TERM FINANCIAL PLAN UPDATE – JULY 2025
MEETING:	PERFORMANCE & OVERVIEW SCRUTINY COMMITTEE
DATE:	15th July 2025
DIVISION/WARDS AFFECTED:	WHOLE AUTHORITY

1. PURPOSE:

- 1.1. To provide the latest six-monthly update of the Council's Medium Term Financial Plan (MTFP), reflecting updated assumptions, risks, and strategic context. The report outlines the projected budget gap for 2026/27 and the medium term, and outlines the context for developing a balanced budget.

RECOMMENDATIONS TO PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE

- i. That the Performance and Overview Scrutiny Committee scrutinise the latest six-monthly update of the Council's Medium Term Financial Plan (MTFP), reflecting updated assumptions, risks, and strategic context.

2. RECOMMENDATIONS (to Cabinet):

- 2.1. Note the updated projected revenue budget shortfall of **£13.6 million** for 2026/27 and a cumulative shortfall of **£38.0 million** over the medium term.
- 2.2. Note the outline budget setting timetable as outlined in Appendix 1.
- 2.3. Note the progress against the Medium Term Financial Strategy (MTFS) delivery plan, as detailed in Section 14 of Appendix 1.

3. KEY ISSUES:

Background

- 3.1. The Council reviews its budgetary position annually and produces a rolling 4-year plan, known as the Medium Term Financial Plan (MTFP). This plan considers the financial context at both the local and national level together with forecast available resources and budgetary pressures in arriving at a forward financial projection.
- 3.2. This report presents the six-monthly update of the Council's MTFP and outlines the context and framework for the budget for the financial year 2026/27, together with a high-level indication of the financial outlook over the medium term.

- 3.3. The updated Medium Term Financial Plan (MTFP) projects a £13.6 million budget gap for 2026/27, rising to a cumulative £38.0 million by 2029/30. This reflects updated assumptions around pay inflation, non-pay inflation, superannuation rates, and service pressures.
- 3.4. The Council has operated in a challenging financial environment since 2010, delivering over £83 million in savings in that time, and absorbing more than £31 million in cost pressures in the last two years alone. Despite these pressures, the Council has maintained a strong track record of financial resilience and effective resource management.
- 3.5. The Council faced significant in-year pressures in 2024/25, particularly in Children's and Adult Social Care, Homelessness, and Additional Learning Needs. These were driven by the ongoing cost-of-living crisis, inflationary pressures, high interest rates, and workforce challenges. Early forecasts projected a deficit of up to £4 million. However, through targeted recovery actions and additional unbudgeted grant funding, the Council achieved a £1.239 million surplus before transfers to reserves. This outcome has helped to stabilise the Council's reserves and reduce future financial risk.

Forward Outlook and Planning Implications

- 3.6. The financial outlook for 2026/27 remains highly uncertain. National and local factors - including economic conditions, policy changes, demographic shifts, and new responsibilities - are expected to influence the Council's operating environment. The UK Government's Comprehensive Spending Review (CSR), published in June, and the anticipated Welsh Government spending review will provide further clarity on future funding levels.
- 3.7. In light of these developments, it is essential that the assumptions, modelling, and risk assessments underpinning the Medium Term Financial Plan (MTFP) are reviewed and updated. This review must reflect:
- The current economic climate and its implications for service demand and cost pressures
 - Revised assumptions aligned with the Council's strategic policy objectives
 - The need for a more agile and responsive financial planning framework.

External context

- 3.8. The Medium Term Financial Plan (MTFP) is shaped by the broader UK economic context and public spending decisions, particularly those made by the UK Government and passed through to the Welsh Government. Since the 2025/26 budget was set, the UK economy has experienced stagnant growth, with weak private sector activity and investment. Rising employment costs and global uncertainties have dampened business confidence, while consumer spending is expected to slow. Fiscal policy remains tight, limiting the potential for economic stimulus. Labour market conditions are softening, with employment growth slowing and wage pressures expected to ease, contributing to a more stable inflation outlook.
- 3.9. However, inflation risks remain elevated due to external pressures such as geopolitical tensions, rising energy and food prices, and new trade tariffs. The Consumer Price Index (CPI) remains above 3%, raising concerns about inflation expectations and wage demands. Elevated gilt yields reflect market concerns over fiscal credibility and global economic

uncertainty. These factors have significant implications for the Council's financial planning, requiring careful review and updating of budget assumptions for 2026/27 and beyond.

Funding context

- 3.10. The Council's revenue budget for 2025/26 is primarily funded through the Welsh Government settlement (60.5%), with the remainder (39.5%) coming from council tax. These two funding streams are central to the Council's medium-term financial planning. However, the broader funding context has been shaped by over a decade of public sector austerity, which has significantly constrained the resources available to Welsh Government and, in turn, local authorities. While recent years have seen positive settlements in cash terms, these have not kept pace with inflation or the increasing demands placed on councils, resulting in real-terms reductions in funding.
- 3.11. Monmouthshire has experienced a variable funding pattern, receiving below-average settlements in 12 of the past 15 years. This reflects a combination of factors, including its demographic characteristics, dispersed population, and comparatively strong ability to generate income through local taxation. Even during periods of national funding growth, Monmouthshire's allocations have tended to be more modest.
- 3.12. While more recent settlements have begun to recognise the vital contribution of councils - particularly during the pandemic and cost-of-living challenges – the ongoing wider economic and political environment has meant that the increasing demands and responsibilities placed on Councils have not always been fully recognised with additional funding.
- 3.13. The Final Local Government Settlement for 2025/26 introduced a funding floor of 3.8%, ensuring that every local authority in Wales received at least a 3.8% increase in core revenue funding compared to the previous year. This approach helped create a fairer distribution of resources and provided additional support to councils like Monmouthshire, which would have otherwise received a lower increase under the standard funding formula. Looking ahead, the 2026/27 settlement is expected to follow a similar pattern. It will be essential for local government to clearly communicate its evolving role and the growing demand pressures to Welsh Government throughout the budget process.

Reserves and School balances

- 3.14. The Council's usable revenue reserves have been significantly drawn down over recent years, particularly during 2022/23 and 2023/24, to support budget proposals and recovery measures. This followed a temporary replenishment during the COVID-19 pandemic through substantial Welsh Government support.
- 3.15. 2024/25 saw a modest improvement in general reserves, however this was offset by a £3.187 million increase in the schools reserve deficit, bringing the cumulative schools position to a £4.1 million deficit. Despite additional investment in school budgets for 2025/26, further reserve use is forecast, weakening the Council's financial resilience.
- 3.16. Monmouthshire's Council Fund remains at 5% of the net revenue budget, a level considered prudent for managing short-term risks. However, the Council has the lowest reserve cover in Wales, which heightens its exposure to financial risk. Many reserves are earmarked for

specific services or timing adjustments, leaving limited flexibility for strategic use. This has prompted a renewed focus on strengthening budget management and in-year financial discipline, alongside a revised reserves policy aimed at protecting and rebuilding reserve levels over the medium term.

- 3.17. Schools receive funding through the Individual Schools Budget (ISB), which totals £60.45 million in 2025/26 - around 27% of the Council's net budget. While schools are responsible for managing their own budgets, the Council retains oversight of their financial performance. Reserve balances vary widely across schools, with some maintaining healthy surpluses and others facing significant deficits. The final position for 2024/25 showed a £3.187 million increase in the overall schools deficit, with 15 of 35 schools now operating in deficit. This was lower than forecast due to late grant funding and cost-saving measures.
- 3.18. The financial challenges facing schools are compounded by the legacy of the pandemic, inflationary pressures, and rising pay costs. Schools are also expected to contribute to wider Council savings and deliver on Welsh Government reforms, including the Curriculum for Wales and the Additional Learning Needs and Education Tribunal Act. These pressures have not always been fully funded, and future investment in education will need to be carefully balanced against the Council's overall financial position. A strategic, evidence-based approach will be essential to ensure sustainability and equity across the school system.

UK Government Spending review and WG budget announcement

- 3.19. The UK Government's June 2025 Spending Review has provided a clearer medium-term funding framework for the Welsh Government, with day-to-day spending allocations confirmed through to 2028–29 and capital grants through to 2029–30. While this offers greater certainty, the funding profile is frontloaded, with more generous allocations in 2026/27 followed by tighter budgets in subsequent years. Day-to-day spending is projected to grow by 1.4% annually in real terms, but capital funding is expected to decline after 2026/27. Most of the additional funding is linked to NHS and school spending in England, implying limited growth for other public services in Wales. This creates a more challenging fiscal environment for future Welsh budgets, particularly post-election.
- 3.20. Although the settlement is described as the largest in real terms since devolution, its historical context reveals a more cautious trajectory for public service funding. The scope for new spending commitments in Wales is likely to be constrained unless additional revenue is raised through devolved taxation.
- 3.21. The Welsh Government announced on the 1 July 2025 that it will publish a one-year budget in October 2025, which will increase departmental budgets in line with inflation. This budget will include a pool of unallocated funding, reserved for the next Welsh Government following the 2026 Senedd election.
- 3.22. The outline Draft Budget, detailing high-level allocations for each department, will be published on 14 October, followed by a more detailed Draft Budget on 3 November. The Final Budget will be released on 20 January 2026, with a debate and vote scheduled for 27 January.

- 3.23. For Monmouthshire, the Spending Review reinforces the prudence of current MTFP assumptions, which anticipate modest growth in grant funding. When adjusted for inflation, these assumptions reflect real-terms reductions in funding. The anticipated Welsh Government Spending Review is expected to provide further clarity for future financial planning.

Budget assumptions and updated budget modelling

- 3.24. The Council's medium term budget model is reviewed and updated on a six-monthly basis, incorporating the latest data and assumptions to reflect changing financial conditions. This process is informed and supported by external data from the Office for Budget Responsibility (OBR), the Wales Fiscal Analysis unit, and the Welsh Local Government Association (WLGA). These sources help validate and challenge the assumptions used, ensuring the model remains robust and evidence-based.
- 3.25. The latest modelling for 2026/27, incorporating revised assumptions and emerging pressures, indicates a projected budget deficit of £13.6 million. While this represents an early view of the financial landscape, it highlights the ongoing challenges facing local government. The budget process remains dynamic, and figures will continue to be refined, but the scale of the projected gap underlines the need for continued financial discipline and strategic planning.
- 3.26. The medium-term financial outlook remains highly uncertain. While current budget assumptions are based on inflation stabilising and public spending aligning with independent forecasts, there are significant downside risks that could worsen the projected budget shortfalls. The forthcoming Welsh Government Comprehensive Spending Review is expected to provide greater clarity on future funding, enabling more informed planning. However, the latest modelling highlights substantial budget gaps over the coming years, with cumulative shortfalls rising from £13.6 million in 2026/27 to £38 million by 2029/30.

Bridging the gap between expenditure and available resources

- 3.27. As the Council prepares its 2026/27 budget, it must carefully evaluate the scope for further savings through service efficiencies or reductions, while also exploring opportunities to generate additional income or secure external funding. Having delivered significant efficiencies since 2010, many services are now operating at the minimum level required to meet statutory duties. In this context, a strategic and evidence-led approach is essential to ensure that resident needs continue to be met within a financially sustainable framework.
- 3.28. Persistent cost pressures, underfunded responsibilities, and funding settlements that have not kept pace with inflation have increased reliance on reserves and one-off capital receipts to balance the budget. With reserves now at comparatively low levels and limited scope for further efficiencies, the Council faces a significant financial challenge. Addressing this will require a forward-looking response focused on long-term reform, financial resilience, and service transformation - particularly within the three highest-spending areas: Social Care & Health, Learning, Skills & Economy, and Infrastructure & Place.
- 3.29. The Council's programme of change provides a strategic framework for reshaping services to meet resident needs within available resources. This is not just a response to financial

pressures but a proactive effort to modernise and improve outcomes. Progress is being made, but greater coordination and discipline are needed to align and report on the various strands of work. Establishing strong foundations will enable better assessment of progress and allow the Council to adapt its approach as needed.

3.30. Key areas of change include digital collaboration, preventative wellbeing strategies, data-driven decision-making, leadership alignment, community-centric service design, workforce development, and asset optimisation. A more centralised approach to assessing the value and alignment of grant funding is also being developed. Robust governance, risk management, and organisational capability will underpin the successful delivery of this programme. This integrated approach is essential to bridging the gap between expenditure and resources while maintaining the Council's commitment to high-quality, resident-focused services.

3.31. The proposed milestone dates for the next steps in the process are outlined below:

Review of latest of budget modelling using updated assumptions & data	September 2025
Budget workshops – SLT/Cabinet/Officers	October 2025
High level pressure & saving mandates produced for Cabinet scrutiny	October 2025
MTFP update report - Cabinet	November 2025
Final pressure & saving mandates to be produced	December 2025
Budget assumptions, pressures and savings to undergo further Cabinet scrutiny	December 2025
Consideration of Welsh Government Provisional settlement	December 2025
Set Council tax base - ICMD	December 2025
Consideration of draft revenue & capital budget proposals - Cabinet	January 2026
Scrutiny of Proposals - Select Committees	January & February 2026
Public Consultation for 2026/27 budget	January & February 2026
Consideration of scrutiny, consultation, final pressures, savings & assumptions	February 2026
Consideration of Welsh Government Final settlement	February 2026
Final budget proposals - Cabinet	March 2026
Formal Council Tax Resolution & Budget Proposals - Council	March 2026

4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING):

4.1. This is a contextual report and therefore carries no direct impacts.

5. OPTIONS APPRAISAL

- 5.1. This report provides an update on the Council's financial planning and provides an early overview of the process for the 2026/27 budget setting process. When budget proposals are developed and brought forward for consultation an option appraisal will be completed for each substantive saving and pressure.
- 5.2. The Council's programme of change is not solely driven by financial constraints, but by a commitment to shaping services that meet the needs of communities and align with the aims set out in the Community and Corporate Plan. It also recognises the importance of designing services for long-term sustainability – that will require a careful balance of choices and priorities.

6. EVALUATION CRITERIA

- 6.1. Whilst the nature of this report does not require any evaluation, the annual budget process is reviewed on an ongoing basis and based on feedback received from the public, members and officers. Cabinet and the Strategic Leadership Team review the process and feedback and recommendations for improvement.
- 6.2. The six-monthly MTFP update is part of the evaluation criteria set as part of the MTFS and which includes the reporting of update against the delivery plan as contained in appendix 1.

7. REASONS:

- 7.1. To provide the latest six-monthly update of the Council's Medium Term Financial Plan (MTFP), reflecting updated assumptions, risks, and strategic context. The report outlines the projected budget gap for 2026/27 and the medium term, and outlines the context for developing a balanced budget.

8. RESOURCE IMPLICATIONS:

- 8.1. There are no resource implications arising directly from this report.

9. CONSULTEES:

Strategic Leadership Team
All Cabinet Members

10. BACKGROUND PAPERS:

Appendix 1 – Medium Term Financial Plan update – July 2025

11. AUTHORS:

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Medium term financial plan update – July 2025

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- 1.1. The Council's Medium term financial strategy (MTFS) and plan (MTFP) are the link between its long-term policy objectives and its financial capacity. It seeks to ensure that the Council's strategic objectives can be achieved within the confines of the financial resources available.
- 1.2. The MTFS, as approved, committed to a six-monthly update of the MTFP, including an update of progress against the performance framework and delivery plan embedded within the MTFS. The first of these updates was received by Cabinet in October 2024 and was subsequently updated as part of the final budget that was endorsed by Cabinet and approved by full Council in March 2025.

Event	Date	Details
MTFS Approval	July 2024	MTFS approved with commitment to six-monthly MTFP updates
First MTFP Update	October 2024	Received by Cabinet on 16th October
Final 2025/26 Budget Approval	March 2025	Final budget endorsed by Cabinet and approved by full Council that included an updated MTFP forecast
Second MTFP Update	July 2025	This document

2. Strategic Financial Context and Outlook

2.1. Overview

- 2.2. The Council's financial planning has been shaped by a consistent and disciplined approach in response to a prolonged period of fiscal constraint. Since the 2009 financial crisis, the Council - like many across Wales and the UK- has operated within a challenging financial environment. Over the period from 2010/11 to date, the Council has delivered over **£83 million** in budget savings. In the last two financial years alone, it has absorbed more than **£31 million** in cost pressures.

2.3. Financial Performance and Resilience

- 2.4. Despite these pressures, the Council has maintained a strong track record in delivering value for money and managing public resources effectively. It has successfully navigated the impacts of austerity, economic recession, and the COVID-19 pandemic.

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- 2.5. The 2024/25 financial year has seen the continuation of financial headwinds which are impacting upon the Council's service operating environment.
- 2.6. The ongoing cost of living crisis and broader socio-economic challenges are increasing demand for Council services, especially in Children's and Adult Social Care, Homelessness, and Additional Learning Needs. Pressures from the wider public sector, particularly Health, are adding complexity to social care needs. Despite falling headline inflation, some services still face rising costs and supply chain issues. High interest rates, expected to persist longer than initially forecast, add financial strain. Additionally, staff shortages continue to affect some Council departments.
- 2.7. The first two financial updates received by Cabinet in October and December 2024 indicated significant pressure on the Councils budget of between £3m and £4m. Cabinet subsequently endorsed mitigating action to develop a structured approach to tackling the forecast deficit through a range of budget recovery measures.
- 2.8. At outturn, the Council successfully mitigated the overall cost pressures through these ongoing targeted actions, and through additional unbudgeted grants and contributions. This has culminated in a gross expenditure budget surplus of £1.239 million prior to transfers to reserves, representing a 0.6% variance against the approved budget.
- 2.9. The final budget position has helped to stabilise the Council's reserves, providing a stronger financial foundation and helping to reduce future financial risks.
- 2.10. **Forward Outlook**
- 2.11. Looking ahead to 2026/27, the financial outlook remains uncertain. Significant changes at both national and local levels are expected to influence the Council's operating environment, including economic conditions, policy shifts, additional responsibilities, and changes in demographic trends.
- 2.12. The UK Government Comprehensive Spending Review (CSR) published in June, and the anticipated Welsh Government CSR will help provide further clarity on the medium term outlook for local government funding.
- 2.13. **Implications for Financial Planning**

2.14. In light of these developments, it is essential that the assumptions, modelling, and risk assessments underpinning the Medium Term Financial Plan (MTFP) are reviewed and updated. This review must reflect:

- The current economic climate and its implications for service demand and cost pressures.
- Revised assumptions aligned with the Council's strategic policy objectives.
- The need for a more agile and responsive financial planning framework.

2.15. Strategic Response

2.16. While the Council's budget process has consistently maintained a medium-term focus, the current funding context, increasing service demands, and the cumulative impact of previous efficiency savings present a highly complex environment for setting the 2026/27 budget. The Council's response must therefore be:

- **Strategic and evidence-led**, ensuring decisions are informed by robust data and analysis.
- **Targeted**, focusing on areas of greatest need and opportunity.
- **Reform-oriented**, supporting long-term sustainability through the wider programme of change.

3. External context

- 3.1. The MTFP is set within the context of the UK economic position and public expenditure plans, with the decisions made by the UK Government and the subsequent funding levels it passes onto Welsh Government having a direct impact upon the expenditure plans of the Council.
- 3.2. Since the 2025/26 budget was set, the UK economy has experienced broadly flat GDP growth, with limited momentum in private sector activity and business investment. This stagnation is largely attributed to rising employment costs and ongoing global uncertainties, which are dampening business confidence. Consumer spending is also expected to soften, and with fiscal policy acting as a constraint on both business and consumer sentiment, any meaningful boost to economic growth is likely to depend heavily on increased government spending.
- 3.3. Labour market conditions are showing signs of easing, with employment levels retreating from recent highs and employment growth projected to remain weak in the near term. Although private sector wage growth and services inflation remain elevated, the Monetary Policy

Committee (MPC) anticipates a gradual decline in wage pressures, forecasting wage growth to slow to around 3.7% by the end of 2025. This softening labour market is expected to exert downward pressure on both wage growth and services inflation, contributing to a more stable inflation outlook over time.

- 3.4. However, near-term inflation risks have increased due to several external factors. Rising oil and gas prices, influenced by geopolitical tensions such as the Israel-Iran conflict, along with new US tariffs and increasing food prices, are pushing consumer prices higher. With the Consumer Price Index (CPI) already above 3% due to regulated price increases, there is growing concern among policymakers about the impact on household inflation expectations and wage demands. Additionally, gilt yields have remained elevated, driven by concerns over fiscal credibility in the UK and US, uncertainty surrounding US monetary and trade policy, and inflationary pressures from higher energy prices.
- 3.5. The context outlined above has significant implications for the Council's medium term financial planning. These implications are summarised below and are central to the update of the budget assumptions for 2026/27 and over the medium term.

Factor	Planning Implications
Inflation	Increased costs across supplies and services, contractual arrangements calculated via CPI/RPI, impact on pay awards.
Supply chains	Disruption to availability of materials, parts and supplies leading to increased costs for alternative/expedited solutions.
Labour market	Shortage of staff and external professional expertise leading to increased costs for commissioned services and agency staff, real living wage implications.
Energy prices	Impact on energy costs across Schools, Leisure centres, Offices, and Street Lighting, fuel costs for Council vehicles and for contracted transport providers.
Interest Rates	Implications on the cost of borrowing and the affordability of the capital programme.
Economic & political landscape	The future level of funding for public services is influenced by both economic and political factors. Global events - such as trade tariffs, conflicts, or political unrest can shift the UK Government's financial priorities. In addition, domestic policy

decisions, like prioritising spending on healthcare, can also affect how much funding is available for other public services.

4. Funding context

4.1. 60.5% of the funding of the Council's revenue budget for 2025/26 came from the Welsh Government settlement, with the remaining 39.5% through council tax income. The assumptions for these funding elements are fundamental in developing robust medium term financial plans.

4.2. Welsh Government settlement

4.3. The public sector austerity measures that were enacted from 2010 onwards have impacted on the resources available to Welsh Government and consequently local government over a sustained period.

4.4. Recent funding settlements in cash terms are outlined below. When taking into account inflation over the period, there has been a significant real terms reduction in funding capability for local government.

Financial Year	Monmouthshire Settlement (Cash terms)	All Wales Settlement (Cash terms)
2011/12	-1.7%	-1.4%
2012/13	-1.8%	0.2%
2013/14	6.5%	6.6%
2014/15	-4.4%	-3.4%
2015/16	-4.3%	-3.4%
2016/17	-3.0%	-1.3%
2017/18	0.0%	0.2%
2018/19	-0.5%	0.2%
2019/20	-0.3%	0.2%
2020/21	3.0%	4.3%

2021/22	3.9%	3.8%
2022/23	11.2%	9.4%
2023/24	9.3%	7.9%
2024/25	2.6%	3.3%
2025/26	3.8%	4.5%

- 4.5. Over this period, local government in Wales has received negative settlements from Welsh Government in four of the fourteen financial years. In comparison, Monmouthshire has received negative settlements in seven of those years.
- 4.6. Whilst the most recent financial years have seen positive settlements for Monmouthshire, critically this has reflected the key role local councils have had in supporting communities through the pandemic period, and in continuing to help address both its legacy impact and the resultant cost-of-living crisis.
- 4.7. As a consequence, when taking into account the additional demand and responsibilities placed upon the Council, these settlements have been below inflation, and therefore reflect real term reductions in funding.
- 4.8. Monmouthshire has received below average settlements in twelve of the fifteen years noted above. The reasons for this are complex and involve consideration of the Council's relative spending requirement when taking into account factors such as population numbers, demographics, sparsity and dispersion, and critically the Council's relative ability to raise income through local taxation.
- 4.9. It is important to note that in years where average Welsh Government settlement is lower than notional (all-Wales) Council tax increases, Monmouthshire tends to receive a below average settlement. It is currently anticipated that 2026/27 will see a recurrence of this, as was experienced in 2025/26.
- 4.10. **Implications of the UK Government Spending review**
- 4.11. The UK Government's recent Spending Review, announced by Chancellor Rachel Reeves on 11 June, has set out a clearer medium-term funding framework for the Welsh Government.
- 4.12. The Wales Fiscal Analysis unit published their analysis in June 2025 on the implications of the spending review on the Welsh Government budget. In summary it concluded the following important points:

- 4.13. *The return to a multi-year spending review offers greater certainty, with block grants for day-to-day spending confirmed through to 2028–29 and capital grants through to 2029–30. This clarity is particularly significant as it will shape the fiscal context for the upcoming Senedd election and inform the development and scrutiny of party manifesto commitments.*
- 4.14. *The Welsh Government’s day-to-day spending is projected to grow by around 1.4% per year in real terms, factoring in devolved tax revenues. However, capital spending is expected to decline after a brief increase in 2026/27, with the capital block grant falling by 3.6% between 2025–26 and 2029–30. Much of the additional funding stems from increased NHS and school spending in England, which accounts for approximately 91% of the new funding for Wales in 2028–29. While this allows for some growth in NHS funding in Wales, it implies tight or flat budgets for other public services.*
- 4.15. *The funding profile is also frontloaded, with more generous allocations in 2026–27 followed by leaner years. This benefits the current Cabinet Secretary for Finance, who may avoid cuts in the pre-election budget. However, the post-election Cabinet Secretary could face real-term reductions in non-NHS spending of around 1.4% annually in 2027–28 and 2028–29, presenting a more difficult fiscal landscape in the latter part of the review period.*
- 4.16. *Although the Spending Review describes the settlement as the largest in real terms since devolution, this is less impressive when viewed in historical context. The average annual growth in day-to-day spending over the current UK Parliament is 1.6%, down from 2.6% in the previous term. This indicates that, despite Labour’s increased departmental spending relative to its manifesto, the overall trajectory for public service funding remains cautious and constrained.*
- 4.17. *Looking ahead, the scope for significant new spending commitments in Welsh party manifestos appears limited unless parties are willing to consider raising additional revenue through the Welsh Rates of Income Tax. The fiscal rules and political promises of no major tax increases at the UK level further constrain flexibility. As such, Welsh political leaders will need to make tough choices about spending priorities and prepare for the possibility that future budgets may need to adapt to changing economic conditions or unforeseen pressures”.¹*
- 4.18. *The Welsh Government announced on the 1 July 2025 that it will publish a one-year budget in October 2025, which will increase departmental budgets in line with inflation. This budget will include a pool of unallocated funding, reserved for the next Welsh Government following the 2026 Senedd election.*

¹ [Spending Review 2025 – the implications for Wales - Thinking Wales - Meddwl Cymru - Cardiff University](#)

- 4.19. The approach is described as responsible and forward-looking, aiming to balance certainty for public services during an election year with flexibility for the next administration. The outline Draft Budget, detailing high-level allocations for each Cabinet Secretary, will be published on 14 October, followed by a more detailed Draft Budget on 3 November. The Final Budget will be released on 20 January 2026, with a debate and vote scheduled for 27 January.
- 4.20. The above context suggests that the current modelling assumptions within the Council's Medium Term Financial Plan (MTFP) shown below - which anticipates modest growth in grant funding over the medium term, remains a prudent basis for financial planning and should continue to inform projected budget gaps.

	2026/27	2027/28	2028/29	2029/30	<i>Sensitivity to 1% change £000's</i>
WG Grant funding change assumption	1.30%	0.90%	1.10%	1.10%	1,352

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- 4.21. When taking into anticipated levels of inflation over the same period, this would reflect real terms reductions in funding levels for the Council.
- 4.22. Welsh Government are expected to publicise their own Comprehensive Spending Review in the coming months, but at the time of writing no formal publication date has been set. It is expected that this will provide further clarity on future year financial settlements for Councils which will further aid medium term financial planning.
- 4.23. **Council Tax**
- 4.24. The updated Council Tax planning assumption is currently modelled at a 3.95% increase for each year of the MTFP.
- 4.25. Council tax income accounts for nearly 40% of the Council's overall income, which proportionately is the highest in Wales. The level of Council tax income will consequently always be an important consideration for the Council in being able to support local services.

Financial Year	Band D Council Tax £*	Band D Council Tax (All Wales average) £*	Increase over Previous Year	All Wales average increase
2015/16	1094.98	1087.91	4.95%	4.36%
2016/17	1138.23	1127.40	3.95%	3.63%
2017/18	1183.19	1161.65	3.95%	3.04%
2018/19	1241.76	1219.07	4.95%	4.94%
2019/20	1315.64	1294.22	5.95%	6.16%
2020/21	1380.76	1354.02	4.95%	4.62%
2021/22	1434.47	1402.51	3.89%	3.58%
2022/23	1476.79	1433.42	2.95%	2.20%
2023/24	1564.66	1512.48	5.95%	5.52%
2024/25	1686.70	1630.83	7.80%	7.82%
2025/26	1,818.26	1746.58	7.80%	7.10%
* Council only charge - excludes the Police and Crime Commissioner for South Wales, and Community Council Precepts				

- 4.26. Consideration of any increase in 2026/27 will need to be given to local context, such as the affordability for communities, balanced against the ongoing need to meet increasing demand and cost pressures of essential services.
- 4.27. The modelling assumption used for 2026/27 at the current planning stage is reflective of the current budget gap driven by the pressures being seen on Council services, balanced alongside the expected funding from other income streams for the Council, including Welsh Government settlement.
- 4.28. Cabinet have not yet made any consideration of the level at which Council Tax will be set for 2026/27, and the rate of increase used is for illustrative purposes only at this stage.
- 4.29. **Fees & Charges for services**

- 4.30. Fees and charges make a significant contribution to the Council's budget, with £24.8m budgeted to be received in 2025/26. Any significant changes to fees and charges are presented for consideration as part of the Council's draft budget proposals and are ultimately approved by Council at final budget setting stage.
- 4.31. The annual planning assumption is that Fees and charges will normally increase at a minimum of the prevailing inflation rate.

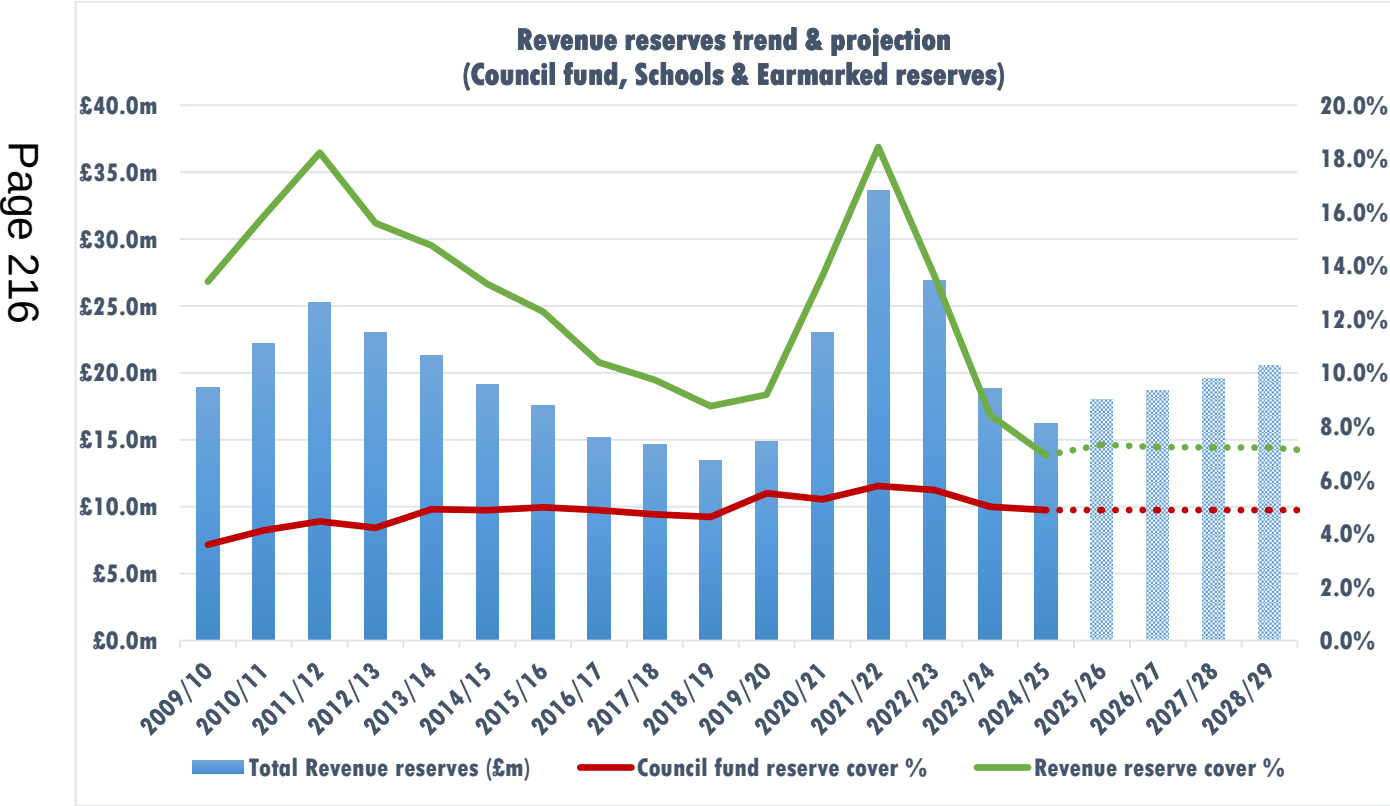
5. Current year budget

- 5.1. The context outlined above continues to impact on the Council's finances in the current financial year.
- 5.2. The first full financial update for 2025/26 will not be considered until September, however early indications are of developing cost pressures and income shortfalls against the approved budget. These are currently in excess of the £850,000 contingency budget that is held.
- 5.3. The Council will need to draw on its successful experience from 2024/25 to bring forward prompt mitigating action by services in order to deliver at least a balanced outturn position by year end.
- 5.4. Notably, the 2025/26 budget continues to be supported by £3.7 million of capital receipts under the Welsh Government's directive on the flexible use of capital receipts. Originally introduced in 2019/20 as a short-term measure to facilitate investment in service transformation and reduce medium-term service costs, this approach was not intended to be a long-term funding strategy. However, the sustained need for service reform over the past five years has necessitated the continued use of this flexibility to support the delivery of cost-reduction initiatives.
- 5.5. The inherent pressures noted above will need to be assessed for their impact upon the 2026/27 budget and over the medium term unless suitably mitigated through service changes, additional funding or alternative recurrent service savings.

6. Reserves

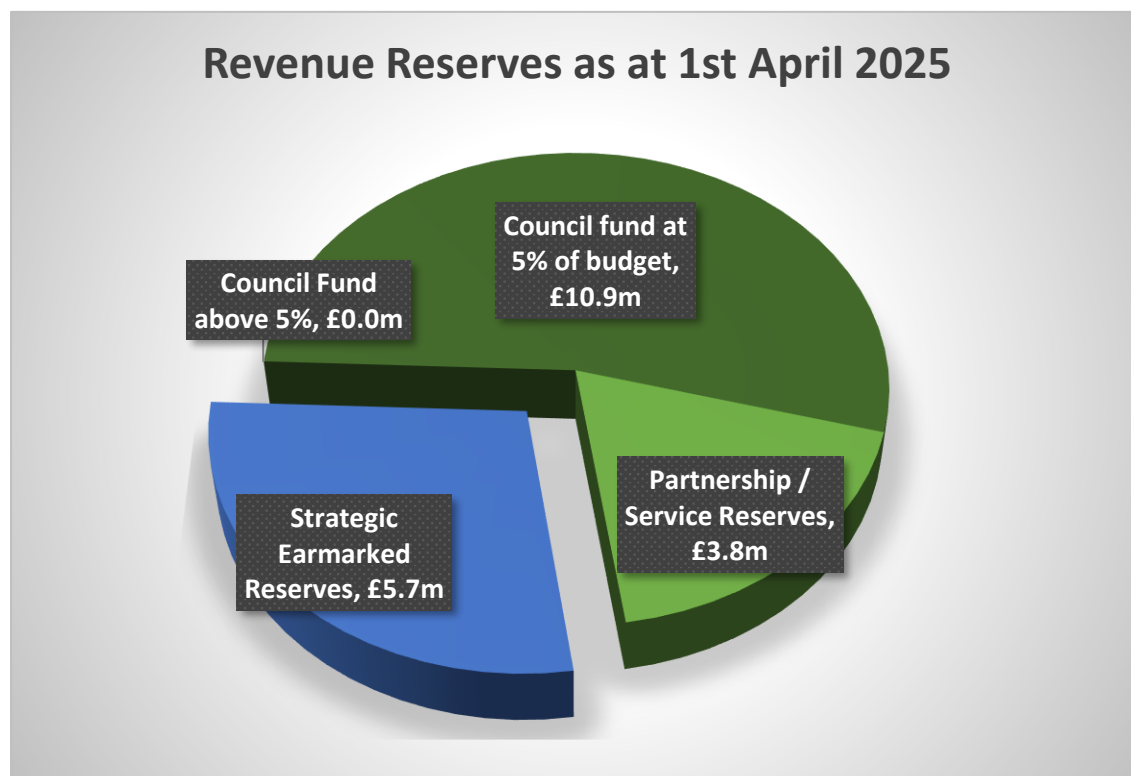
- 6.1. The Council's usable revenue reserves have been significantly depleted due to the need to support both the budget proposals and subsequent recovery measures during the 2022/23 and 2023/24 financial years. This follows a period during the COVID-19 pandemic when reserves were partially restored through substantial Welsh Government funding.

- 6.2. The decisions to utilise reserves were made with careful consideration. Without this intervention, the Council would have faced severe and immediate impacts on service delivery. A balanced approach was necessary in light of the inflationary pressures and increased demand arising from the cost-of-living and public health crises.
- 6.3. Although the 2024/25 financial year saw a modest replenishment of the Council Fund and earmarked reserves, this was outweighed by a £3.187 million increase in the schools reserve deficit, bringing the cumulative schools reserve position to a £4.1 million deficit. Despite additional investment in schools' base budgets for 2025/26, a further draw on reserves is currently forecast. This trend weakens the Council's balance sheet, undermines financial resilience, and heightens risk exposure by reducing available resources.
- 6.4. The current and projected levels of the Council's usable revenue reserves are detailed below:



- 6.5. The Council Fund remains at 5% of the net revenue budget, a level deemed prudent and sufficient to manage short-term financial risks.

- 6.6. Over the medium term, overall reserve levels are expected to remain relatively stable. However, it is important to note that Monmouthshire currently has the lowest reserve cover as a percentage of net revenue budget in Wales². This necessitates a revised reserves policy that prioritises the protection of revenue reserves to safeguard against both anticipated and unforeseen risks. Strengthened budget management and in-year financial discipline will be essential to promptly identify overspends and implement mitigating actions or savings.
- 6.7. This challenge is further exacerbated by the fact that many reserves are earmarked for specific services, partnerships, or timing adjustments, leaving a limited proportion available for strategic use, as outlined below:



preservation of an appropriate and prudent level of reserves.

- 6.8. The 2025/26 budget planning framework emphasised the need to place the Council on a path toward long-term financial sustainability, including the

² [Audit Wales report on financial sustainability of local government, December 2024 – Table 3](#)

- 6.9. The framework established clear principles for the use of general and earmarked reserves, including a commitment to avoid reliance on revenue reserves to balance the budget.
- 6.10. The reserves policy will continue to evolve to ensure that revenue reserves are both protected and replenished over the medium term, thereby maintaining the Council's capacity to respond to future financial risks.

7. Schools' budgets and reserve balances

- 7.1. The Council allocates funding to schools through an annual delegated budget, known as the Individual Schools Budget (ISB), for which each school's governing body holds direct responsibility. However, the Council retains a key oversight role in monitoring the overall financial performance of schools.
- 7.2. For the 2025/26 financial year, the total ISB delegated to schools amounts to **£60.45 million**, representing approximately **27%** of the Council's net budget.
- 7.3. The majority of school funding is provided by the Council, which receives resources for pre-16 education through the Welsh Government's local government revenue settlement and local taxation. Post-16 education funding is allocated via specific Welsh Government grants. Schools may also generate supplementary income through voluntary contributions, donations, and the rental of premises to community groups.
- 7.4. Schools begin each financial year with reserve balances that reflect cumulative surpluses or deficits from previous years.
- 7.5. The trend in net school reserve balances over the past ten years is as follows:

Year	Net level of School Balances (Surplus) / Deficit in £000's
2015/16	(1,156)
2016/17	(269)
2017/18	(175)
2018/19	232

2019/20	435
2020/21	(3,418)
2021/22	(6,956)
2022/23	(4,257)
2023/24	905
2024/25	4,092

- 7.6. The final financial position for 2024/25 showed a significant use of reserves, leading to an overall increase of £3.187 million in the total schools' deficit. As a result, 15 out of 35 schools are now operating in deficit. Earlier forecasts had predicted the deficit could reach £5.0 million, but this was reduced due to cost-saving measures and additional grant funding received later in the year.
- 7.7. There is considerable variation in financial performance across schools. While some continue to deplete their reserves, raising concerns, others maintain relatively healthy surpluses.
- 7.8. Pandemic-related grants temporarily boosted school balances, masking underlying structural deficits in some schools.
- 7.9. Over the past decade, ISB funding has generally increased at a rate exceeding the Council's own settlement from the Welsh Government. However, during and immediately following the pandemic, this trend reversed, coinciding with a period of substantial grant funding to schools.
- 7.10. The legacy of the pandemic continues to affect schools, particularly in areas such as attendance, behaviour, wellbeing, and additional learning needs. Addressing these challenges has required increased staffing and specialist support, driving up costs.
- 7.11. The post-pandemic period has also seen sustained inflation and higher pay awards for teaching and non-teaching staff - costs that have not always been fully funded.
- 7.12. Schools have also been expected to contribute to addressing the Council's broader budgetary pressures during successive challenging financial years.

- 7.13. Concurrently, schools are required to implement the Welsh Government's long-term education reform agenda, including the Curriculum for Wales, reducing absenteeism, closing the attainment gap, and meeting the requirements of the Additional Learning Needs and Education Tribunal Act.
- 7.14. In light of the current funding context and the structural deficits within some schools, the level of future investment in education will be a critical consideration in the upcoming budget process.
- 7.15. The Council's approach must be evidence-based and strategically balanced, taking into account the variability in school financial positions, the overall budget gap, and the need to develop a sustainable, balanced budget.

8. Budget assumptions and the projected budget gap

- 8.1. The Authority's medium term budget modelling is reviewed regularly and reported into the Performance & Overview scrutiny committee and Cabinet on a six-monthly basis. The model contains the base budgets of the Authority overlaid with assumptions that are then updated in the light of updated data and information. This allows prudent changes to be made to the modelling to enable the gap between resources and expenditure to be highlighted.
- 8.2. External data from sources such as the Office for Budget Responsibility (OBR), and the Wales Fiscal Analysis unit support the budget assumptions applied within the modelling.
- 8.3. This is further supported by the work that Welsh Local Authorities produce through the Welsh Local Government Association (WLGA), that allows validation and challenge of the assumptions made throughout the budget process.
- 8.4. The latest budget planning assumptions are shown below which reflect the updated assumptions following new data and information coming forward:

Budget assumptions 2026/27	Previous assumption	Updated Assumption	Impact of 1% change in £000's
Expenditure:			
Pay award (non-teaching staff)	2.30%	3.00%	1,099

Pay award (teaching staff – from September 2026)	2.30%	3.00%	419
Superannuation rates	25.3%	23.90%	668
Non-pay inflation	0.00%	2.00%	1,279
Service pressures (non-schools)	£7.5m	£7.5m	
Service pressures (schools)	£0.0m	£0.0m	
Borrowing cost pressures	£1.0m	£1.0m	
Fire levy	3.95%	3.95%	62
Income and Efficiencies:			
Staff vacancy factor (non-schools)	3.00%	3.00%	659
Fees and charges	2.00%	2.00%	217
Funding:			
Welsh Government Settlement (AEF)	1.3%	1.3%	1,352
Council Tax (MCC) - Band D increase	3.95%	3.95%	786
Capitalisation direction support	£2,358,000	£2,708,000	

8.5. The updated review of the assumptions contained in the modelling suggested a number of prudent proposed changes:

Pay award (non-teaching staff)	Increase from 2.3% to 3.0%. Assumptions had previously been based on forecast movements in inflation in line with the target of 2% over the medium term, recognising that there is often a lag effect within pay negotiations. The latest Monetary Policy Committee (MPC) forecasts anticipates a more gradual decline in wage pressures, forecasting wage growth to slow to around 3.7% by the end of 2025. It is therefore felt prudent to revise this assumption upward at the current time.
Pay award (teaching staff)	Increase from 2.3% to 3.0% (September 2026 onwards).

	The independent pay review body has recommended a 4% increase for the academic year starting September 2025. Whilst it is yet to be accepted, this forms the basis of the forecast for the 5/12ths that will fall into the 2026/27 financial year. The projection for the 2026/27 academic year is in line with non-teaching staff at 3% for the reason outlined above.
Superannuation rates	Reduce from 25.3% to 23.9%. The Council's Local Government Pension Scheme valuation review in 2025 has resulted in revision to the Councils contribution rate, with a stepped reduction recommended from 24.9% in 2025/26 to 21.9% in 2028/29. This has resulted from an improved overall pension funding position within the fund. The Teacher's Pension Scheme (TPS) was subject to its actuarial review which increased contributions with effect from 1st April 2024 and funded via Welsh Government grant.
Non-pay inflation	Increase from 0% to 2.0%. Over more recent years a non-pay inflation factor of 0% has been used for modelling purposes, in favour of relying on more evidence-based pressures being brought forward from services. This was adjusted in 2025/26 following reflection upon previous budget rounds and the significant impact that inflation has had on final cost pressures experienced by services. At this stage, an allowance of 2% remains prudent. This assumption will be further considered as better information becomes available.
Service pressures (non-schools)	Maintain at £7.5m. Provision is made within the budget modelling for "unidentified pressures" of £7.5m in each of the 4 years of the medium-term financial plan and based on the level of pressures that have historically presented themselves and been accommodated as part of the budget process.

	When considering the gross pressures included within the 2024/25 budget outturn, coupled with early indications of cost pressures on the 2025/26 budget, this assumption remains prudent. An initial review of recurrent pressures impacting 2026/27 will be made in the early stage of the budget process and will be the subject to rigorous review and challenge with the aim of reducing and mitigating their impact.
Service pressures (schools)	Maintain at £0.0m. Given the funding context as outlined in Section 6 above, the level of further investment in schools over and above meeting new pay and non-pay pressures, will be a key consideration during the budget process. The additional recurring £1m of funding added to schools' budgets for 2025/26 will provide ongoing support for pressures being experienced. Any further investment will need to be carefully balanced with overall funding landscape for the Council, the need to set a balanced budget, and the need for schools to operate within a financially sustainable budget.
Borrowing cost pressures	Maintain at £1.0m. A full review of the revenue cost of existing and planned capital expenditure will be undertaken during the budget process. At this early stage, as a net borrower, the prevailing interest rate environment. Coupled with capital programme commitments, is expected to create further cost pressure of £1.0m in 2026/27.
Staff vacancy factor (non-schools)	Maintain at 3% Services have consistently experienced a challenging labour market with a shortage of available staff in some discrete service areas which has led to pressure on existing staff structures, and increased costs for commissioned services and agency staff. A vacancy freeze initiated as part of the budget recovery action during over recent years is expected to maintain a degree of vacancy throughout staffing structures leading into 2026/27.

Fees and charges	Maintain at 2% As a general rule, the council's policy is based on full cost recovery with inflationary uplifts considered annually to ensure that the Council recovers its costs for the services it provides. Whilst a blanket uplift is not applied, an increase in line with inflation is expected unless there is a clear evidence base to do otherwise. With inflation proving stickier than previously anticipated, this assumption will be kept under constant review.
Welsh Government Settlement (AEF) Page 224	Maintain at 1.3% increase Welsh Government have not provided an indication of future year financial settlements, with Councils therefore modelling potential scenarios for their medium term financial planning using the support of the Welsh Local Government Association (WLGA) and Wales Fiscal Analysis unit. A Comprehensive Spending Review is expected to be forthcoming from Welsh Government which will provide more certainty on funding allocations in the medium term. However in periods of comparatively low funding settlements, Monmouthshire has historically received a below Wales average increase due to the factors that influence individual Authority settlements.
Council Tax increase	Maintain at 3.95% The assumption of council tax increases are solely for modelling purposes and Cabinet have not yet considered the level at which Council Tax will be set for 2026/27. With Council tax income accounting for nearly 40% of the Council's overall income, which proportionately is the highest in Wales, this is clearly an important consideration. Consideration will need to be given to local context, such as the affordability for communities, balanced against the ongoing need to meet increasing demand and cost pressures of essential local services.

Fire levy	Maintain at 3.95% The Council is required to pay a levy and annual contribution towards the South Wales Fire and Rescue Authority. A planning assumption of a 3.95% increase has now been modelled ahead of the process of consultation and engagement with constituent Councils. This increase is reflective of the expected pressure on SWFRA budgets.
Energy	The Council procures its energy through a purchasing consortium, benefiting from regular market intelligence and data updates to inform budget planning. As the budget-setting process progresses, the financial impact of revised energy tariffs will be evaluated across the Council's operational estate, street lighting infrastructure, and the solar farm. Given the volatility of external market conditions, the energy cost landscape remains fluid. This necessitates ongoing monitoring and responsive management, including the potential implementation of mitigation strategies. These may involve reassessing the Council's decarbonisation initiatives and identifying opportunities to reduce overall energy consumption.

8. The effect of these revised assumptions and pressures being incorporated into the updated modelling is shown below for 2026/27, indicating a projected budget deficit of £13.6m.
- 8.7. This represents an early assessment of the budget landscape for 2026/27. The budget process is always a dynamic one, and all figures will be revised during the process. The funding outlook for local government does, however, remain challenging and the projected budget gap a very real one.

2026/27 projected budget gap	(£000's)	
2025/26 Balanced Budget		0
<u>Pay</u>		
Superannuation rate	-668	
Pay inflation - non-teaching	3,243	

Pay inflation - teaching	1,385	
		3,940
<u>Non-Pay</u>		
Non-pay inflation	2,558	
Fire Levy	244	
Service pressures (non-schools)	7,500	
Service pressures (schools)	0	
Waste Adjustment	3,035	
Indicative budget savings	-819	
Treasury, Corporate & Reserves	1,456	
		13,974
<u>Income</u>		
Council tax increase	-3,106	
WG settlement increase	-1,758	
Fees & Charges	-434	
Reduction in capitalisation directive support	1,000	
		-4,298
Budget Gap		13,616

9. Budgetary Risk

- 9.1. In preparing the Council's 2026/27 budget, a number of financial uncertainties persist, driven by limited forward-looking information and a volatile economic environment that continues to place pressure on public services. In this context, it is essential to maintain a robust risk management framework that enables the identification, assessment, and mitigation of financial risks wherever possible.
- 9.2. The principal risks currently influencing the Council's financial planning are summarised below:

Service pressures	There is currently limited clarity regarding the recurrent budget pressures that will carry forward, as well as new pressures anticipated for 2026/27. This uncertainty presents a challenge in accurately forecasting service demands and associated costs.
National living wage / Real living wage	The Council's pay structure, particularly at the lower end, is directly influenced by increases in the National Living Wage. Each financial year must begin with the lowest pay scale meeting or exceeding the NLW expected in the following April. Although no forecasts are currently available, historical trends show that even during periods of low inflation, the NLW has typically increased by at least 4%, with the exception of 2021. The limited headroom at the lower end of the pay scale may necessitate a review of the Council's grading structure. Additionally, as a Real Living Wage employer, the Council ensures all staff and apprentices are paid at or above this level, which is closely aligned with NLW movements. The NLW also has significant implications for commissioned care services, where the Welsh Government expects local authorities to ensure care workers are paid in line with the NLW.
Economic factors	Inflation and interest rate fluctuations continue to impact the cost of goods, services, and borrowing, placing additional pressure on the Council's financial position.
Delivery of budget saving proposals	81.6% of the £10.9 million in-year savings for 2024/25 were delivered - broadly consistent with historical performance. However, this highlights a potential risk in achieving full delivery of savings targets for 2026/27.
Variations to settlement Assumptions	Each 1% change in the Welsh Government settlement equates to approximately £1.3 million, significantly influencing the Council's ability to plan and deliver services effectively.
Income	The ongoing cost-of-living crisis continues to affect household disposable income, which in turn impacts demand for income-generating Council services. The new responsibilities under the Extended Producer Responsibility scheme for Waste are yet to be fully embedded within services, with the corresponding funding levels being based upon future disposal performance.

Debt recovery	Similarly, financial pressures on households are affecting the Council's ability to recover debts, including Council Tax and charges for services.
Capacity for service change delivery	High vacancy levels across Council services may limit the organisation's capacity to implement strategic service changes and transformation initiatives.

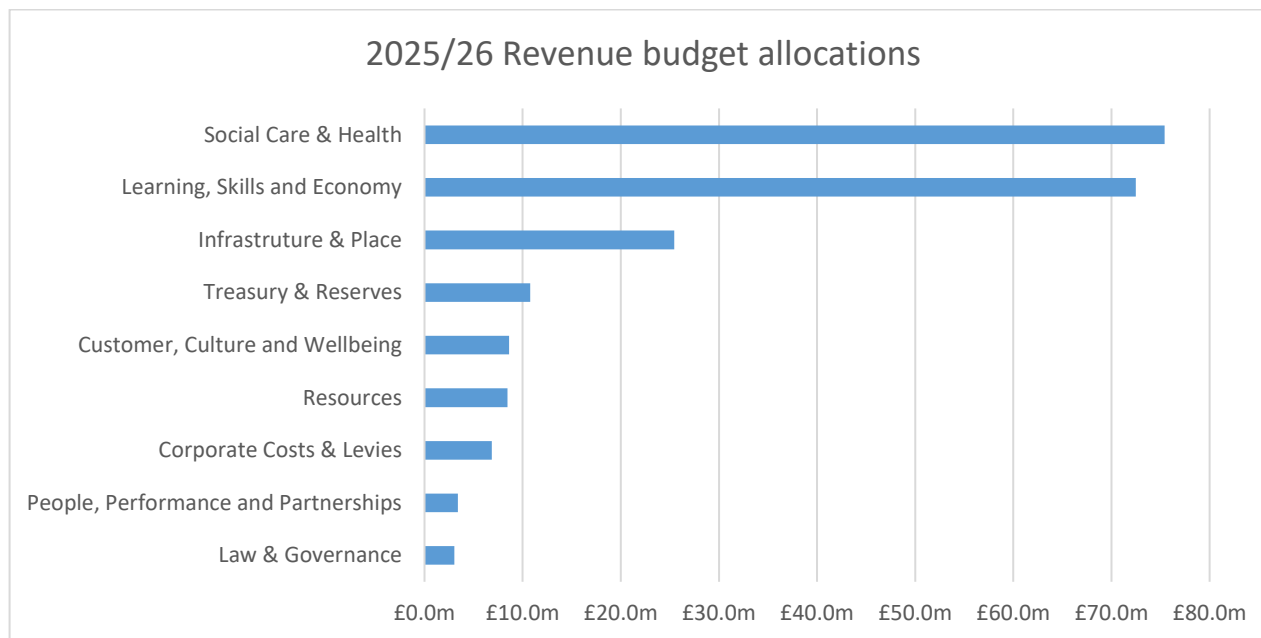
10. Medium term outlook

- 10.1. The medium term outlook remains very uncertain at the current time. Budget assumptions have been revised and based on the premise that inflation will remain under control, and that public spending by UK Government and the consequential impact on local government in Wales are in line with independent analysis. There are a lot of downside risks that could still play out and that could adversely impact further the budget shortfalls modelled over the medium term.
- 10.2. It is anticipated that the Welsh Government Comprehensive Spending Review will provide greater clarity on funding levels over the medium term that will allow service changes to be considered and planned over a more certain timeframe.
- 10.3. The most up to date modelling indicates significant budget gaps over the medium term:

Budget shortfall	In Year (£m)	Cumulative (£m)
2026/27	13.6	13.6
2027/28	8.4	22.0
2028/29	8.0	30.0
2029/30	8.0	38.0

11. Bridging the gap between expenditure and available resources

- 11.1. As the Council prepares for the 2026/27 budget and looks ahead over the medium term, Cabinet must carefully assess the extent to which further cost savings can be achieved through service efficiencies or reductions. This assessment must also consider the potential for mitigating budget shortfalls through additional funding streams or income generation.
- 11.2. Since 2010, the Council has responded to sustained financial austerity by delivering significant efficiencies across services. Many areas are now operating at the minimum level required to meet statutory obligations. In light of the projected budget gap for 2026/27 and beyond, a more strategic, evidence-led approach is essential to ensure that resident needs continue to be met within a financially sustainable framework.
- 11.3. Persistent cost pressures, coupled with funding settlements that have not kept pace with inflation or rising demand, and the introduction of new, often underfunded responsibilities, have led to a growing reliance on savings, efficiencies, and the use of reserves and capital receipts to balance the budget.
- 11.4. With reserve levels now comparatively low and the scope for further efficiencies increasingly constrained, the Council faces a significant financial challenge. Addressing this will require a deliberate and forward-looking response - one that prioritises long-term reform, financial resilience, and the transformation of service delivery.
5. Of the Council's £227 million service delivery budget, 77% is allocated to three core service areas: Social Care & Health; Learning, Skills & Economy; and Infrastructure & Place (including Waste, Housing, Planning, Highways, and Transport). Achieving financial sustainability over the medium term will necessitate substantial and targeted programmes of change within these high-expenditure areas.



11.6. The Council's programme of change

- 11.7. The Council's evolving programme of change, underpinned by strong financial governance, provides the strategic framework through which services will be reshaped to meet resident needs within available resources. This programme is not simply a response to financial pressures but also a proactive effort to modernise and improve outcomes.
- 11.8. Positive progress continues across the programme of change. To maximise its impact, there is a requirement for coordination and discipline to how this work is captured, aligned, and reported. Doing so will help create a more coherent and connected picture of the overall programme, even though different elements are at varying stages of development.
- 11.9. By putting strong foundations in place, better assessment can be made of the quality and direction of the work underway, ensuring that the outcomes being achieved are moving the Council in the right direction. This will also allow the Council to quickly adapt and refine approach as needed.

11.10. Equally important is identifying what the Council is not doing or may need to stop doing, given the limits on capacity, resources, and funding. Making these choices will be key to delivering meaningful and sustainable change.

11.11. Key areas of ongoing change include:

- **Digital Collaboration:** Leveraging technology to streamline operations, improve service accessibility, and reduce costs.
- **Whole-Authority Strategy for Wellbeing and Prevention:** Shifting focus from reactive services to preventative approaches that improve long-term outcomes and reduce demand.
- **Data-Driven Decision Making:** Embedding the systematic use of data and evidence in policy development and service planning.
- **Leadership Alignment:** Ensuring senior leadership is fully engaged and aligned with transformation objectives to drive cultural and operational change.
- **Community-Centric Service Design:** Enhancing resident engagement and co-design to ensure services are responsive, inclusive, and locally relevant.
- **Workforce and Organisational Culture:** Investing in staff development, fostering innovation, and embedding a culture of continuous improvement.
- **Asset optimisation:** The strategic asset management plan is building on identifying underutilised or surplus assets and transforming for new, more effective uses that align with community needs and policy goals.
- A more centralised co-ordination and **assessment of value/outcome/alignment of specific grant funding** streams with our future direction of travel.
- **Appropriate and fit for purpose governance, risk management and capability** – ensuring that all of the above and below is underpinning with sound arrangements to keep the business safe and secure, for delivery and implementation to be overseen, and impacts and outcomes successfully delivered.

11.12. This integrated approach to change is essential to bridging the gap between expenditure and available resources, while maintaining the Council's commitment to delivering high-quality, resident-focused services.

Budgetary Framework for 2026/27

11.13. The budget framework will be underpinned by the set of strategic budget principles approved as part of the MTFS in July 2024:

MTFS Strategic Budget Principles

1. To maintain financial management arrangements that will be sufficiently robust to support the delivery of financial plans and mitigate corporate risks.
2. A citizen facing budget focused on mitigating any potential impacts of inequality or climate change.
3. A balanced budget reflecting objectives, priorities and commitments set out in the Council's Community and Corporate Plan.
4. Council budgets to be continually reviewed to ensure resource allocations are delivering value money and continue to align to the delivery of priority outcomes.
5. Budgets set without budget shortfalls having general recourse to reserve funding. In year spending will be met by in year funding.
6. The Council Fund (general reserve) will be maintained at a minimum of 5% of Net Revenue Expenditure (excluding the Schools Delegated budget) over the period of the MTFS.
7. An affordable and acceptable level of council tax increase with qualifying households being encouraged to access all dispensations they are entitled to receive.
8. To increase existing fees and charges. As a minimum fees and charges will be increased to match cost inflation. The Council will review opportunities to introduce new fees as appropriate.
9. To manage, wherever possible, any necessary reduction in the workforce through turnover rather than through specific voluntary or compulsory redundancy programmes.
10. To optimise the use of specific grant funding across the Council, taking advantage of legitimate opportunity to offset existing core cost through direct charge to the funding stream.
11. To sustain services through the development of strategic partnering arrangements with other local authorities, public sector partners, town and community councils, and third sector organisations.
12. Informed estimates will be factored into the MTFP for cost pressures anticipated to result from inflation, demand increases, growth and investment.

MTFS Strategic Budget Principles

13. To maintain a budget contingency budget of no less than £1m from 2025/26 with specific criteria for its use. No reduction in the budget is permissible unless there is a clear and realistic plan for reinstating the budget within the Medium Term.
14. To optimise the use of land and buildings and consider alternate uses or disposal where there is not a clear ongoing case for continued use.
15. To be open to using capital receipt balances to support one-off revenue expenditure associated with service reform and to reviewing existing capital programme commitments not yet entered into.
16. Capital investment decisions will support the Council's corporate priorities and mitigate any statutory risks taking account of the return on investment and robust business cases.
17. Prudential borrowing will only be used to support the capital programme where it is affordable and sustainable within the Council's overall borrowing limits and the revenue budget over the long term.
18. To act in accordance with council's risk appetite in determining the amount of risk that the council is willing to seek or accept in the pursuit of its objectives.

Capital programme

- 12.1. In the current climate of financial constraint, capital investment must remain within affordable limits. Demand for capital resources continues to exceed availability, making the prioritisation of projects, securing external funding, and collaboration with partners essential to meeting investment needs.
- 12.2. The capital programme is subject to the same external pressures affecting the revenue budget, including inflation, supply chain disruptions, and internal resourcing challenges. These factors are contributing to delays and reduced delivery capacity within existing capital budgets.
- 12.3. While ongoing condition surveys and monitoring help identify and manage risks, the ageing asset base will inevitably require increasing levels of investment to maintain or refurbish infrastructure to acceptable standards.

12.4. Annual capital allocations for asset maintenance and refurbishment are targeted at the highest-priority backlog issues, focusing on assets in the poorest condition and associated risks. Estate optimisation, asset disposals, transfers, and strategic capital projects will also be used to mitigate risk, although these measures will not fully address the total backlog.

12.5. The current draft capital MTFP is outlined below:

Scheme	Final Budget 2025/26	Indicative Budget 2026/27	Indicative Budget 2027/28	Indicative Budget 2028/29	Indicative Budget 2029/30
Expenditure	£	£	£	£	£
Property Maintenance	1,872,357	1,653,357	1,653,357	1,653,357	1,653,357
Property Maintenance Fees	236,194	236,194	236,194	236,194	236,194
County Farms Maintenance	300,773	300,773	300,773	300,773	300,773
Upgrade School Kitchens	39,725	39,725	39,725	39,725	39,725
Asset Management Schemes	2,449,049	2,230,049	2,230,049	2,230,049	2,230,049
Bergavenny 3-19 school	12,232,076	0	0	0	0
School Development Schemes	12,232,076	0	0	0	0
Carriageway major works	1,136,540	1,136,540	1,136,540	1,136,540	1,136,540
Carriageways & Structures – additional improvements	2,743,000	1,312,000	1,312,000	1,312,000	1,312,000
Safety fence upgrades	76,181	76,181	76,181	76,181	76,181
Footway Reconstruction	197,453	197,453	197,453	197,453	197,453
Reconstruction of bridges & retaining walls	449,041	449,041	449,041	449,041	449,041
Road safety & trafficman programme	161,508	129,508	129,508	129,508	129,508
Signing upgrades & disabled facilities	38,091	38,091	38,091	38,091	38,091
Street Lighting Defect Column Programme	171,408	171,408	171,408	171,408	171,408
Flood Alleviation Schemes	30,427	11,427	11,427	11,427	11,427
Drainage & Gully works	375,000	375,000	375,000	375,000	375,000
Structural Repairs - Public rights of way	437,091	118,091	118,091	118,091	118,091
Surveys and Closures - Public rights of way	90,000	90,000	90,000	90,000	90,000
Ash Dieback/Dangerous Trees works	170,000	100,000	100,000	100,000	100,000
Infrastructure & Transport Schemes	6,075,740	4,204,740	4,204,740	4,204,740	4,204,740

Capital Region City Deal	730,200	730,200	730,200	730,200	730,200
S106 Schemes	287,524	0	0	0	0
Regeneration Schemes	1,017,724	730,200	730,200	730,200	730,200
Disabled Facilities Grant	900,000	900,000	900,000	900,000	900,000
Access for all - Schools	50,000	50,000	50,000	50,000	50,000
Access For All	250,000	250,000	250,000	250,000	250,000
Inclusion Schemes	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000
ICT Hardware replacement	126,000	260,000	260,000	260,000	260,000
Network Estate replacement	100,000	50,000	50,000	50,000	50,000
SRS capital reserve contribution	61,000	61,000	61,000	61,000	61,000
Business world upgrade transition	40,000	0	0	0	0
Asset Management software transition	51,000	0	0	0	0
Ransomware & security	84,500	42,000	42,000	42,000	42,000
ICT Schemes	462,500	413,000	413,000	413,000	413,000
Vehicle Leasing	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Vehicles Leasing	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Capitalisation Directive	3,707,500	2,357,500	1,357,500	0	0
Capitalisation Directive	3,707,500	2,357,500	1,357,500	0	0
Fixed Asset Disposal Costs	50,000	50,000	50,000	50,000	50,000
Match Funding of Grant applications	500,000	500,000	500,000	500,000	500,000
Contingency budget	0	560,000	560,000	560,000	560,000
Other Schemes	550,000	1,110,000	1,110,000	1,110,000	1,110,000
Total Expenditure	29,194,590	13,745,490	12,745,490	11,387,990	11,387,990
Funding	£	£	£	£	£
Supported Borrowing	(2,432,000)	(2,432,000)	(2,432,000)	(2,432,000)	(2,432,000)
Unsupported Borrowing	(18,068,566)	(4,256,990)	(4,256,990)	(4,256,990)	(4,256,990)
Grants & Contributions	(3,333,524)	(3,046,000)	(3,046,000)	(3,046,000)	(3,046,000)
Reserve Funded	(103,000)	(103,000)	(103,000)	(103,000)	(103,000)
Capital Receipts	(3,757,500)	(2,407,500)	(1,407,500)	(50,000)	(50,000)

Vehicle Lease Financing	(1,500,000)	(1,500,000)	(1,500,000)	(1,500,000)	(1,500,000)
Total Funding	(29,194,590)	(13,745,490)	(12,745,490)	(11,387,990)	(11,387,990)
(Surplus) / Deficit	0	0	0	0	0

- 12.6. The Council's Capital Strategy sets out the framework for making and managing capital investment decisions aligned with corporate objectives. It ensures a consistent, informed, and transparent approach to investment planning. The Capital Strategy will be refreshed and presented alongside final budget proposals to Council in March 2026.
- 12.7. While the core capital programme remains in place and supports infrastructure investment, significant backlog pressures persist outside the programme due to affordability constraints. These pressures carry varying levels of risk that must be actively managed and mitigated.
- 12.8. All schemes within the indicative programme will be reviewed for timing and alignment with strategic priorities. Non-urgent projects may be deferred to focus resources on priority schemes or to release capital receipts for wider service redesign.
- 12.9. The Capital Programme for 2026-2030 will be reviewed during the budget-setting process to ensure revenue implications are accurately reflected and that capital plans remain affordable, prudent, and sustainable.
- 12.10. The capital receipts summary below shows the expected level of receipts and planned usage, highlighting the balances available in the next few years. Future investment in capital schemes, is in part dependent on future success of achieving capital receipts as it mitigates the requirement for borrowing.

13. Budget Process and Timetable

- 13.1. In the context of all the above, setting a balanced budget for 2026/27 will be significantly challenging and will involve difficult decisions that will allow Cabinet to align and deliver the aims and aspirations set out in its revised Corporate and Community plan, and within the confines of available funding. The work required needs to involve Members and Monmouthshire communities as early in the process as possible.
- 13.2. The draft milestone dates in developing the budgetary process for 2026/27 is as follows:

Review of latest of budget modelling using updated assumptions & data	September 2025
Budget workshops – SLT/Cabinet/Officers	October 2025
High level pressure & saving mandates produced for Cabinet scrutiny	October 2025
MTFP update report - Cabinet	November 2025
Final pressure & saving mandates to be produced	December 2025
Budget assumptions, pressures and savings to undergo further Cabinet scrutiny	December 2025
Consideration of Welsh Government Provisional settlement	December 2025
Set Council tax base - ICMD	December 2025
Consideration of draft revenue & capital budget proposals - Cabinet	January 2026
Scrutiny of Proposals - Select Committees	January & February 2026
Public Consultation for 2026/27 budget	January & February 2026
Consideration of scrutiny, consultation, final pressures, savings & assumptions	February 2026
Consideration of Welsh Government Final settlement	February 2026
Final budget proposals - Cabinet	March 2026
Formal Council Tax Resolution & Budget Proposals - Council	March 2026

14. Progress against the MTFS Delivery plan

- 14.1. The medium term financial strategy (MTFS) approved by Council in July 2024 outlined the delivery plan that will convert the MTFS into practice. The plan contains the actions proposed in accordance with the strategy document. These align to the strategy's key aims and objectives.
- 14.2. There was a commitment made to provide a six-monthly update on progress against the delivery plan to monitor progress of the plan against the core objectives. The latest update of progress is outlined below:

Action No.	Action/Description	Outcome/Output	Milestones			Timescale for completion	Responsible Officer/Body	Progress update July 2025
			25/26	26/27	27/28			
Page 238	Develop a Change and Improvement plan to enable delivery of required savings over the medium term	Programme of work developed with overarching governance to enable delivery to be co-ordinated	✓	✓	✓	Continual but next milestone is input into 26/27 budget process – Autumn 2025	Cabinet/SLT	Programme evolving to formally capture ongoing change processes.
2	Delivery of budget holder training	Refresh and rollout of training to all budget holders	✓	✓	✓	Autumn 2025	Head of Finance	
3	Self-assessment of compliance with CIPFA Financial Management Code	Self-assessment to identify further actions to improve the Council's financial management		✓	✓	March 2026	Deputy Chief Executive	
4	Independent financial resilience review to be undertaken	Independent review to highlight and further areas for improvement		✓		March 2026	Deputy Chief Executive	

5	Enhance approach to modelling future growth, demand, demographic and inflationary pressures in the MTFP		✓	✓	✓	Ongoing	Head of Finance	Work is progressing on developing more evidence based data metrics to support the budget process. Some of this has already been embedded within the updated assumptions in this plan update
6	Revenue reserves (including school balances) and useable capital receipt review to be undertaken in line with the revised reserves policy	Rationalisation of revenue reserves	✓			July 2025	Deputy Chief Executive; Head of Finance	Completed as part of 2024/25 outturn and endorsed by Cabinet
7	Financial risk register to be maintained and regularly updated	To ensure that suitable mitigations are in place against key financial risks	✓	✓	✓	Ongoing	Head of Finance	Risks have currently been identified and updated as part of this plan update. Also captured through various risk registers.
8	Annual review of fees and charges	To benchmark and assess fees and charges to ascertain scope for further income potential	✓	✓	✓	December 2025 and annually	Head of Finance	

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Committee / Decision Maker	Meeting date / Decision due	Report Title	Cabinet member	Purpose	Author	Date item added to the planner
Cabinet	Deferred	Pavement Café Policy	Paul Griffiths - Sustainable Economy	To adopt the pavement café policy as the basis for making decisions on applications for licences	Carl Touhig	4-Oct-22
Cabinet	11-Feb-26	2025/26 Revenue & Capital Monitoring Update 3	Ben Callard - Resources		Jon Davies	12-Jun-25
Cabinet	11-Feb-26	2026/27 WCF/Mon Farm treasury strategy	Ben Callard - Resources		Jon Davies	12-Jun-25
Cabinet	21-Jan-26	2026/27 Draft Revenue & Capital budget proposals	Ben Callard - Resources		Jon Davies	12-Jun-25
Cabinet	10-Dec-25	2025/26 Revenue & Capital Monitoring Update 2	Ben Callard - Resources		Jon Davies	12-Jun-25
Cabinet	19-Nov-25	Destination Management Plan	Sara Burch & Paul Griffiths		Collette Bosley	17-Apr-25
Council	23-Oct-25	RLDP for Adoption	Paul Griffiths - Sustainable Economy		Rachel Lewis	17-Apr-25
Cabinet	15-Oct-25	Review of Monmouth Cluster and proposed statutory consultation	Laura Wright - Education		Matt Jones	3-Mar-25
Cabinet	15-Oct-25	2025/26 Revenue Monitoring Update 1	Ben Callard - Resources		Jon Davies	12/76/25
cabinet	15-Oct-25	Ensuring a good quality and sustainable service model for Community Meals	Ian Chandler - Social Care & Safeguarding		Jane Rogers	19-Jun-25
Cabinet	15-Oct-25	A strategy to take forward a whole authority approach to wellbeing and prevention	Ian Chandler - Social Care & Safeguarding		Jane Rogers	19-Jun-25
Cabinet	15-Oct-25	Cultural Strategy	Sara Burch		Tracey Thomas	20-May-25
Council	18-Sep-25	Self-assessment 2024/25		To seek Council approval of the self-assessment report 2024/25 in line with requirements outlined in the Local Government and Elections (Wales)	richard Jones	10-Jun-25
Cabinet	17-Sep-25	Real Living Wage Employer Accreditation	ben Callard - Resources	Further to Cabinet's decision on Wednesday 6th November 2024, and an evaluation of the authority's supply chain, to bring forward a further report detailing the plan to pay the real living wage rate to employees of third parties contracted	Philippa Green	13-Jun-25
Cabinet	17-Sep-25	County of Sanctuary Strategy	Angela Sandles - Engagement	To approve a county of sanctuary strategy which establishes clear principles which will run through all council services and which promotes inclusion	Sharran Lloyd and Jane Harvey	27-May-25

Cabinet	17-Sep-25	Review of Housing Support Grant Programme.	Sara Burch		Ian Bakewell	23-May-25
ICMD	23-Jul-25	Lloyds tour of Britain Stage 5 Pontypool to Tumble	Angela Sandles - Engagement		Nick John	2-Jul-25
ICMD	23-Jul-25	Welsh Church Fund Working Group	Ben Callard - Resources		Dave Jarrett	2-Jul-25
Council	17-Jul-25	Chepstow Integrated Transport LUF project			Deb Hill Howells	24-Jun-25
Council	17-Jul-25	Strategic Director's Report, Children, Learning, Skills and the Economy'	Laura Wright - Education		Will Mclean	18-Jun-25
Cabinet	16-Jul-25	2024/25 Revenue & Capital monitoring Outturn (incl early update on 2025/26)	Ben Callard - Resources		Jon Davies	12-Jun-25
Cabinet	16-Jul-25	2026/27 Revenue & Capital MTFP update and process	Ben Callard - Resources		Jon Davies	12-Jun-25
Cabinet	16-Jul-25	Shire Hall Delivery Stage - Financial Approval	Ben Callard - Resources		Tracey Thomas	25-Mar-25
Cabinet	16-Jul-25	ADD AS FIRST ITEM Social Partnership and Public Procurement (Wales) Act 2023: Monmouthshire County Council's Annual Report	Ben Callard - Resources	To seek approval of the Social Partnership Duty Report 2025, setting out how the Council will build on existing practice, and work collaboratively with trade unions, to ensure compliance with the Social Partnership and Public Procurement (Wales) Act	Philippa Green	6-Jun-25
Cabinet	16-Jul-25	Play Sufficiency Update	Angela Sandles - Engagement		Nick John	28-Mar-25
Council	26-Jun-25	Strategic OfficerLeadership and Organisation Structure changes	Mary Ann Brocklesby - Whole Authority Strategy		Paul Matthews	5-Jun-25
Council	26-Jun-25	Appointments to Outside Bodies	Angela Sandles - Engagement		John Pearson	23-May-25
Council	26-Jun-25	Separation of Licensing Functions	Angela Sandles - Engagement		Linda O Gorman	28-May-25

Council	26-Jun-25	Licensing Act Policy 2025	Angela Sandles - Engagement	Policy has to be approved by Full Council and it needs to be in place by 1 st July 2025	Linda O Gorman	10-Jan-25
Cabinet	25-Jun-25	Strategic Risk Assessment	Mary Ann Brocklesby - Whole Authority Strategy	To provide Cabinet with an overview of the current strategic risks facing the authority.	richard Jones	10-Jun-25
Cabinet	25-Jun-25	Nature Recovery Action Plan & Green Infrastructure Strategy	Catrin Maby - Climate Change and Environment		Collette Bosley	17-Apr-25
Cabinet	21-May-25	Placemaking Grant 25/26 & 26/27	Paul Griffiths - Sustainable Economy		Craig O Connor	29-Apr-25
Cabinet	21-May-25	Marches Forward Partnership	Mary Ann Brocklesby - Whole Authority Strategy		Peter Davies / Cath Fallon	1-Apr-25
Cabinet	21-May-25	Active Gwent Sports Partnership	Angela Sandles - Engagement	For Monmouthshire County Council to formally enter into the Active Gwent sport partnership.	Nick John	28-Mar-25
Cabinet	21-May-25	Y Prentis Update	Paul Griffiths - Sustainable Economy		Hannah Jones	26-Feb-25
Cabinet	21-May-25	Digital, Data and Technology Collaboration	Mary Ann Brocklesby - Whole Authority Strategy	To develop proposals to build on existing collaborative arrangements in place for the provision of technology services through the Shared Resource Service. Expanding on these to include digital and data services will generate	Peter Davies & Matt Gatehouse & Sian Hayward	14-Mar-25
Council	15-May-25	SAC Membership Report	Martyn Groucutt - Education	To inform Council of SAC recommendations to appoint members of SAC	Sharon Randall-Smith	16-Apr-25
Council	10-Apr-25	Constitution Review	Angela Sandles - Engagement		James Williams	25-Mar-25

Council	10-Apr-25	Senior Pay Review	Ben Callard - Resources		Julie Anthony	3-Mar-25
ICMD	09-Apr-25	PSPO Lane Closure to prevent fly tipping & off roading	Catrin Maby - Climate Change and Environment		Mark Cleaver	13-Mar-25
ICMD	09-Apr-25	Welsh Church Fund Working Group - meeting 4	Ben Callard - Resources			
Cabinet	02-Apr-25	Marches Forward Partnership	Mary Ann Brocklesby - Whole Authority Strategy		Peter Davies - Lead (Cath Fallon)	3-Mar-25
Cabinet	02-Apr-25	Reponse to Boundary Commission Electoral Review Consultation	Angela Sandles - Engagement		John Pearson	12-Feb-25
ICMD	26-Mar-25	Proposal to increase the fee payments to Monmouthshire Foster Carers	Ian Chandler - Social Care & Safeguarding		Charlotte Drury	4-Feb-25
ICMD	12-Mar-25	Highway Traffic Regulation Amendment Order No 16	Catrin Maby - Climate Change and Environment			
Council	06-Mar-25	Appointment of Chief Officer - Head of Transport - Exempt info	Catrin Maby - Climate Change and Environment		Deb Hill Howells	21-Jan-25
Council	06-Mar-25	Publication of the Councils Pay Policy	Ben Callard - Resources	To approve the publication of Monmouthshire County Council's Pay Policy, in compliance with the Localism Act.	Matt Gatehouse / Pip Green	17-Jan-25

Council	06-Mar-25	Contract Procedure Rules	Ben Callard - Resources		Scott James	9-Jan-25
Council	06-Mar-25	2025/26 Final Budget sign off including CT resolution	Ben Callard - Resources		Jon Davies	13-Jun-24
Council	06-Mar-25	2025/26 Capital Strategy & Treasury Strategy	Ben Callard - Resources		Jon Davies	13-Jun-24
Cabinet	05-Mar-25	Approval of a Discretionary Policy for Council Tax Premiums	Ben Callard - Resources		Ruth Donovan	27-Jan-25
Cabinet	05-Mar-25	2025/26 Final Revenue and Capital Budget Proposals	Ben Callard - Resources		Jon Davies	4-Jun-24
Cabinet	05-Mar-25	2025/26 WCF/Mon Farm Strategy	Ben Callard - Resources		Jon Davies	4-Jun-24
ICMD	26-Feb-25	County of Sanctuary: Homes for Ukraine	Angela Sandles - Engagement	To confirm future support arrangements for Ukranian's living in Monmouthshire as part of the Homes for Ukraine Scheme following changes to the national arrangement for both funding & visas	Richard Drinkwater/Matt Gatehouse	7-Feb-25
ICMD	26-Feb-25	Housing Allocations Policy				
Cabinet	19-Feb-25	2024/25 Revenue and Capital Monitoring Month 9	Ben Callard - Resources		Jon Davies	4-Jun-24
Cabinet	19-Feb-25	UK Shared Prosperity Fund post March 2025 – financial implications and impact	Paul Griffiths - Sustainable Economy		Hannah Jones	10-Jul-24

ICMD	29-Jan-25	2025/26 Community Council and Police Precepts final	Ben Callard - Resources		Jon Davies	17-Dec-24
Council	23-Jan-25	Council Diary 2025/26	Angela Sandles - Engagement		John Pearson	
Council	23-Jan-25	GWENT REGIONAL PARTNERSHIP BOARD (RPB) AREA PLAN AND RPB ANNUAL REPORT 23/24	Ian Chandler - Social Care & Safeguarding		Natasha Harris (Torfaen)	
Council	23-Jan-25	Council Tax Reduction Scheme 2025/26	Ben Callard - Resources		Jon Davies	13-Jun-24
Cabinet	22-Jan-25	Business case for the purchase of a property in Abergavenny to develop supported accommodation for care experienced young people	Ben Callard - Resources		Jane Rogers	7-Jan-25
Cabinet	22-Jan-25	2025/26 Draft Revenue and Capital Budget Proposals	Ben Callard - Resources		Jon Davies	4-Jun-24
Cabinet	22-Jan-25	Education Middle Tier	Martyn Groucutt - Education		Will McLean	20-Nov-24
ICMD	15-Jan-25	Decision to transfer Dixton Archive from Monmouth Museum to Herefordshire Record Office			Rachael Rogers	9-Dec-24
ICMD	15-Jan-25	Welsh Church Fund Working Group - meeting 3	Ben Callard - Resources		Dave Jarrett	13-Jun-24
ICMD	18-Dec-24	2025/26 Community Council and Police Precepts draft	Ben Callard - Resources		Jon Davies	13-Jun-24

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Monmouthshire's Scrutiny Forward Work Programme 2024-25

Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
SPECIAL 9th July 2025	Domiciliary Care Procurement (with People members)	To scrutinise the process of domiciliary care procurement.	Jane Rodgers Jenny Jenkins Cllr Chandler	Performance Reporting
15th July 2025	Revenue & Capital monitoring outturn	To scrutinise the budgetary position (revenue and capital) for services falling within the committee's remit, including an early update on 2025/26.	Jonathan Davies Peter Davies Cllr Callard	Performance Reporting
	Enabling Strategies (including Procurement)	To include Procurement, Digital and Data, Asset Management, Finance and People. (Audit Wales work)	Richard Jones Hannah Carter Cllr Callard	Performance Reporting
	Self-Assessment 24/25	To scrutinise the self-assessment and identify areas for further scrutiny.	Richard Jones Hannah Carter Cllr Brocklesby	Performance Reporting
23rd September 2025	Revenue Monitoring Update 1	To scrutinise the revenue position for services falling within the committee's remit.	Jonathan Davies Peter Davies Cllr Callard	Performance Reporting
	Chief Officer for Social Care AMR	To scrutinise the progress and strategic direction for the service area.	Jane Rodgers Jenny Jenkins Cllr Chandler	Performance Reporting
	Safeguarding Annual Report	To scrutinise the performance of safeguarding arrangements.	Jane Rodgers Diane Corrister Cllr Chandler	Performance Reporting
18th November 2025	Revenue & Capital Monitoring Update 2	To scrutinise the budgetary position (revenue and capital) for services falling within the committee's remit.	Jonathan Davies Peter Davies Cllr Callard	Performance Reporting

Monmouthshire's Scrutiny Forward Work Programme 2024-25

Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
	Complaints Process	To scrutinise the performance of the Council's complaints process, and issues raised by it.	Annette Evans Cllr Sandles	Performance Monitoring
	Economy, Employment and Skills Strategy action plan update	To update the committee on the Economy, Employment and Skills Strategy action plan.	Hannah Jones Will McLean Cllr Griffiths	Performance Monitoring
DECEMBER SPECIAL? - Tues 2nd?	Planning Annual Performance Report – from Nov 25	Scrutiny of the annual performance report prior to submission to Welsh Government.	Philip Thomas Craig O'Connor Cllr Griffiths	Performance Monitoring
	WESP (Welsh in Education Strategic Plan) Autumn 25	To scrutinise performance against the plans.	Sharon Randall Smith Will McLean Cllr Wright	Performance Monitoring
	School Exclusions update – after October (or later with other items?)		Morwenna Wagstaff Keeva McDermott	Performance Monitoring
JANUARY SPECIAL? - Tues 20th?	Schools Health Research Network			
10th February 2026	Draft Revenue & Capital budget proposals	To scrutinise the 2025/26 Draft Revenue and Capital Budget Proposals.	Jonathan Davies Peter Davies Cllr Callard	Performance Reporting

Monmouthshire's Scrutiny Forward Work Programme 2024-25

Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
	Revenue & Capital Monitoring Update 3	To scrutinise the budgetary position (revenue and capital) for services falling within the committee's remit.	Jonathan Davies Peter Davies Cllr Callard	Performance Reporting
	<i>Risk Register update?</i>			
10th March 2026				
21st April 2026	<i>Development of Children's Placements – 12mth (approx) update</i>	<i>To update the committee following scrutiny in May 25.</i>	Morwenna Wagstaff Will McLean Cllr Wright	<i>Performance Reporting</i>
	<i>Investment and Commercial Interests Update – 12mth (approx) update</i>	<i>To update the committee following scrutiny in May 25.</i>	Nick Keyse Peter Davies Cllr Callard	<i>Performance Reporting</i>
To be confirmed	Grants item – Joint with People?*	To scrutinise the Council's use of grant money.	Jonathan Davies Hannah Jones	Performance Monitoring
To be confirmed	Consultants and Agencies – Joint with People?*	To scrutinise the Council's use of consultants and agency workers – the number, relative value, reasons, etc.	Jonathan Davies Peter Davies?	Performance Monitoring
To be confirmed	Potholes	To scrutinise the assessment of requirements, how these are prioritised, MCC's approach, etc.	Carl Touhig	Performance Monitoring
To be confirmed (15/10/24, Cabinet Nov 24 –	NEET Reduction Strategy	To scrutinise the strategy's performance.	Hannah Jones Louise Wilce Cllr Griffiths	Performance Monitoring

Monmouthshire's Scrutiny Forward Work Programme 2024-25

Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
<i>10th March 26?) [1 page summary – see minutes]</i>				
<i>To be confirmed – January would be best</i>	Schools Health Research Network	To inform the committee about the data and insights from the SHRN work led by Cardiff University relating to pupil well-being.	Emma Taylor Will McLean	Performance Monitoring
<i>To be confirmed (15/10/24 – covered by Audit Wales item in July?)</i>	<i>Socially Responsible Procurement strategy</i>	<i>To review progress of the strategy.</i>	<i>Gemma Ellis John Paxton Cath Fallon Cllr Brocklesby</i>	<i>Performance Monitoring</i>
<i>To be confirmed</i>	<i>Supporting Vulnerable Learners</i>	<i>To follow up from June 25 - annual.</i>	Morwenna Wagstaff Lucie Doyle Cllr Wright	Performance Reporting
<i>To be confirmed</i>	<i>Risk Register Update</i>	<i>To follow up from June 25.</i>	Richard Jones Hannah Carter Cllr Callard	Performance Reporting
<i>To be confirmed</i>	<i>Community & Corporate Plan progress update?</i>		Richard Jones Hannah Carter	Performance Reporting
<i>To be confirmed</i>	<i>Recruitment and retention</i>	<i>Effect on the Council's performance and ability to deliver.</i>		

Monmouthshire's Scrutiny Forward Work Programme 2024-25

Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
<i>To be confirmed</i>	<i>Use of Reserves</i>	<i>Future proofing and resilience planning as well as supporting long-term strategic priorities.</i>	<i>Peter Davies Jonathan Davies Cllr Callard</i>	
Social Justice Strategy progress				
Business Monmouthshire Project monitoring				
'Learning led' review of educational provision in Chepstow				
Review of Property Assets				

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Performance and Overview Scrutiny Committee

Action List

29th April 2025

Minute Item:	Subject	Officer / Member	Outcome
4	To bring a report to the committee on the work being done with the Schools Health Research Network (SHRN) led by Cardiff University, providing quantitative data on student well-being	Scrutiny officers, Emma Taylor, Will McLean	Added to FWP and request for dates sent to officers.
7	To explore if more information can be included on items in the Council and Cabinet Work Planner; in particular, how reports and decision listed will affect residents	Peter Davies, Matt Gatehouse	Taken forward by Peter Davies to SLT
7	To remind officers of the intention to scrutinise grant funding more widely following the recent call-in to People committee of the decision regarding the Shared Prosperity Fund	Scrutiny officers, Jonathan Davies	Scrutiny scheduled for 15 th July covering grants

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Performance and Overview Scrutiny Committee

Action List

3rd June 2025

Minute Item:	Subject	Officer / Member	Outcome
5	To provide anonymised summary information to further explain the report	Morwenna Wagstaff, Jackie Elias, Hayley Page	
5	To provide the committee with the overall transport costs	ibid	
5	To provide the report previously supplied as an appendix (?)	ibid	
6	To provide the additional reports that can't be accessed from the links in the report	Morwenna Wagstaff, Lucie Doyle	
7	To send detail explaining the traffic light categories in Appendix 3	Richard Jones, Hannah Carter	
7	To provide detail as to how and why 9B, the risk of school non-attendance, is at Medium (8), given its importance	Richard Jones, Hannah Carter	

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Monmouthshire Select Committee Minutes

Meeting of Performance and Overview Scrutiny Committee held at Council Chamber, County Hall, The Rhadyr USK on Tuesday, 29th April, 2025 at 10.00 am

Councillors Present

County Councillor Alistair Neill, (Chair)
County Councillor Rachel Buckler, (Vice Chair)

County Councillors: Jill Bond, Steven Garratt, Meirion Howells, M. Newell, Paul Pavia, Peter Strong, Su McConnel (substituting for John Crook)

Also in attendance County Councillors:
Ben Callard, Cabinet Member for Resources,
Ian Chandler, Cabinet member for Social Care, Safeguarding and Accessible Health Services
and Martyn Groucutt, Cabinet Member for Education

Officers in Attendance

Hazel Ilett, Scrutiny Manager
Robert McGowan, Policy and Scrutiny Officer
Peter Davies, Acting Chief Executive
Will McLean, Chief Officer for Children and Young People
Jane Rodgers, Chief Officer for Social Care, Safeguarding and Health
Scott Hereford, Service Manager Residential and Resource Management
Nicholas Keyse, Estates Development Manager
Ed Pryce, Assistant Director, EAS

APOLOGIES: County Councillor John Crook

1. Declarations of Interest

Councillor Pavia declared a non-prejudicial interest in Item 5 as he works for Practice Solutions Ltd. that holds the business delivery contract for the Association of Directors of Social Services in Wales.

Councillor Neill declared a non-prejudicial interest in Item 4 as Chair of the ARIC committee of EAS.

2. Public Open Forum

None.

3. Key Stage 4 Results

Ed Pryce (Assistant Director, EAS) delivered a presentation, introduced the report, and answered the members' questions with Will McLean.

Members' Questions:

- What does it mean for pupils to have base qualifications and how does it affect their life outcomes?

Base qualifications help pupils access the next level of education, such as FE and HE, and are increasingly required for many jobs. Achieving qualifications can improve attendance and engagement, leading to better life outcomes.

- Are we limiting schools by grouping them in families, and how does this affect the support for pupils attaining the lowest third results?

Grouping schools in families allows for comparison and support, but schools also look at other families and focus on individual learners. The aim is to hold leaders accountable and ensure school improvement processes are in place.

- How do we know that the Welsh Government's expectations are good enough for pupils in Wales and Monmouthshire, and how can we change the lower attainment in Wales compared to the UK?

Welsh Government uses international tests like Pisa to compare performance. There are challenges in comparing with other UK countries due to different assessment systems, but qualifications are recognized by UK universities.

- What measures are being done for the lowest third attainment?

Measures for the lowest third attainment include improving attendance, addressing deficits, and ensuring the curriculum is appropriate. Schools focus on individual needs and support through pupil deprivation grants.

- Does relying solely on PISA for international comparisons of young people's performance, and only providing data specific to Wales, limits the ability to confidently ensure that young learners are receiving the best opportunities globally, not just within Wales?

There are challenges in comparing educational performance across borders, particularly between England and Wales, due to differences in grading systems. We need to get to a position of confidence by the end of statutory education, where students' success in vocational or academic paths is determined by employers or standardised exams like A-levels, which are comparable across the UK. Tools like the Alps system help to model prior attainment and A-level performance to add value to specific subject areas. The border counties are in a unique position and there is a need to consider various educational opportunities, such as those in nearby regions like Bristol. Despite the lack of direct comparability, the focus remains on supporting students in making informed choices and maximising their potential.

- Are there any obvious reasons for the slight difference in Caldicot's performance, and are recent difficulties improving?

The answers for Caldicot's performance are for the governing body of Caldicot to address, and it is not appropriate to delve into individual school diagnostics in this report.

- Is there any difference expected in the comparisons as a result of the new curriculum coming through the schools?

Differences are expected due to the new curriculum, which will increase the variety and differentiation of provision available to learners. The frameworks for accountability are still being developed.

- Are deficits linked to behaviour, and are we working towards emotionally healthy schools and social and emotional learning and development?

Deficits can be linked to behaviour, and schools focus on attendance, well-being, attitudes to learning, and behaviour. There is significant work on supporting learners' emotional health and development.

- How are you going to use this data with governors, teachers, parents, and pupils?

Data is shared with governors through reports and training sessions. Schools provide simplified digests of the information to their governing bodies, which can be shared in parental reports.

- Are any other – more qualitative – measures taken e.g. the happiness index, parent/pupil satisfaction?

*It is certainly important to understand the overall development of young adults beyond academic qualifications. Schools use various commercially available systems to gather feedback on students' feelings and attitudes, though this data is typically used at the school level and not aggregated upwards. Additionally, the Schools Health Research Network (SHRN) led by Cardiff University provides significant quantitative data on student well-being, involving all schools. – **ACTION: to bring a report to the committee explaining this data and its insights***

- Can true parity be achieved between male and female students?

Achieving true parity between male and female students might be challenging. However, the new curriculum and a wider range of qualifications could provide more flexibility, allowing learners to choose qualifications that highlight their strengths. This approach may create more opportunities for parity, but it remains difficult to predict the outcome.

- Have the weighted formula for free school meals families and the Index of Multiple Deprivation been challenged or reviewed for fairness?

The weighted formula for free school meals families and the Index of Multiple Deprivation have been determined and reviewed by Welsh government statisticians. The data is refreshed regularly, with the last update in 2024 and future updates planned every three years. However, there is no current work being undertaken to specifically review the fairness of the model.

- Was this data shared with Estyn, and how does it relate to recent inspections at, for example, Caldicot?

Estyn has seen the data, along with a broader range of data. They do not give this data more weight than other data. During inspections, Estyn focuses more on firsthand observations of teaching quality, learning, and student progress, rather than second-hand data like qualifications data. Three of our secondary schools have had visits this academic year. In terms of the recommendations that were identified by Estyn at Caldicot, the school has to complete what is called a post-inspection action plan and the local authority also has to complete a statement of action. So there is a huge amount of resource and support going towards Caldicot's improvement journey.

- How confident are we that the current improvement strategies are sustainable, especially given issues with school finances?

It is difficult to ever be fully satisfied with improvement strategies, as there is always room for betterment. However, the outcomes for 2024, which reset to 2019 levels, were broadly pleasing. There is

confidence in the current teaching and learning developments in schools, and the local authority believes there is still room for improvement. Financial issues are recognised as a risk, but the focus remains on maintaining a secure and effective workforce and ensuring schools use their resources efficiently. Despite financial pressures, the commitment to supporting students and improving performance remains strong.

- What mitigation strategies will be put in place, given teachers' concerns about the new curriculum coming in in September?

The new curriculum starting in September will make it difficult to maintain trending comparisons of performance. While this year's exams will be comparable to those from 2023 and 2024, the changes will affect comparisons from 2025 onwards. This will present challenges in understanding performance trends, but the current exams will still provide some continuity for comparison.

- How can teachers use this information in individual schools to improve performance?

Teachers use detailed data within schools to improve teaching and learning practices. The data helps in generating conversations with individual learners and improving future cohorts.

- Are there any plans to have parents' meetings with year 10 and year 11 parents and pupils to help them understand this data?

Schools are encouraged to share performance data in their annual governance report to parents, which is a legal requirement. This helps parents understand the data and its implications.

- Are we contacting the press to ensure they understand this data and avoid any misleading headlines?

The data is publicly available online on the Welsh Government's "My Local School" website, ensuring transparency and accessibility for the press and public.

- Are we encouraging teachers to become GCSE examiners to help improve performance?

Encouraging teachers to become GCSE examiners is a valuable suggestion, as it can provide insights into the examination process and improve teaching strategies.

- Trying to close the gender gap can be frustrating, as measures to improve males can lead to improvement in females as well, so both improve but a gap remains. Is that reflected in the national trends?

Yes, that can be an unintended consequence, but a positive consequence, of interventions that can not lead to closing a gap – but to improve the performance of both groups is positive.

- Is the number of pupils leaving with no qualifications not statistically relevant as the numbers are so low?

The number of pupils leaving with no qualifications is indeed very small. However, the focus is not on the numbers themselves but on the detailed conversations that take place in each school between the school improvement partner and the head teacher. These discussions involve understanding each learner's background, what has been done to support them, the positives, and what can be improved for future learners in similar situations. The quality of these conversations is what truly matters.

- How does the language of "expectation of outcomes" influence schools, particularly in terms of management and teaching staff? Could this language condition attitudes towards the potential outcomes and abilities of young people, potentially being detrimental to them?

It is important to maintain high expectations for all learners to raise attainment levels. The Education Endowment Foundation's work highlights that having high expectations is crucial, especially for learners eligible for free school meals. The RADI (Raising the Attainment of Disadvantaged Youngsters) approach, used effectively in some schools, advocates for a blind approach where all learners are treated with the same high expectations, setting aside preconceived ideas about their potential achievements. There is a need to continue promoting high expectations to ensure learners are not limited by perceived restrictions. The concern is not about high expectations but rather the detrimental impact of low expectations based on grouping.

Chair's Conclusion:

The Chair thanked the officers and Cabinet Member for the report, the thorough explanation of it, and the responses to the committee's questions. On behalf of the committee, the Chair recognised and expressed appreciation for all of the fantastic work going on in Monmouthshire's schools.

4. Development of Children's Placements

Jane Rodgers introduced the report and answered the members' questions with Scott Hereford and Cabinet Member Ian Chandler.

Members' Questions:

The Committee undertook thorough scrutiny of the report, highlighting the following important issues for the Cabinet Member's consideration:

- The report at section 3.5 mentions significant changes to the for-profit provider market introduced about 18 months to two years ago. How have these changes destabilised the market and increased placement costs? What do the increased costs look like, and how are they related to the committee's concerns flagged two years ago about excluding for-profit providers?

The market for residential children's homes and placements is complex, making it difficult to determine cause and effect. Even before the Welsh government's policy changes, there were already indications of placement shortages and high competitiveness, with both Welsh and English children in Welsh placements. The market has become more competitive and destabilised further, coinciding with the policy changes and local authority developments. Despite this, there remains a high demand for for-profit private placements. The costs have risen significantly, with average weekly costs increasing from around £5,000 per child a couple of years ago to around £9,000-£10,000 per child now.

- Given the increase in costs from £5,000 to £9,000 per week over two years, which is a significant rise in a short period, how have you managed your budgets to cope with these unanticipated changes?

The strategy involves safely reducing the number of children requiring placements, recruiting and retaining sufficient in-house foster placements, and developing their own placements. Despite these

efforts, managing high-cost placements remains difficult. The challenges are shared by all local authority children's services in Wales. The strategy emphasises increasing in-house foster placements, noting that residential placements involve a small number of children compared to fostering.

- Do we have any further sense of which providers will stay, convert, or exit the market following the new legislation?

It is too early to predict which providers will stay, convert, or exit the market, as many are keeping their business plans confidential. Efforts are being made to engage with providers to understand the situation better.

- What alternative strategies are being considered for sourcing suitable properties in the north of the county, including potential cross-border provision?

Developing and sharing placements with other regions and local authorities is being considered, though it is complicated. Mechanisms for exchanging placements and ensuring no voids are being discussed at regional levels.

- What are the contingencies if we cannot secure further grant money for placements?

The business cases for placements have been made considering scenarios with and without capital grants. Even without grants, there is a strong business case for accessing borrowing through the Council.

- Are there any lessons learned from the success of Caldicot that can inform the development in Monmouth?

The success of Caldicot is noted, and lessons learned include the importance of engaging with local residents and ensuring smooth transitions for young people. Specific operational details and staffing structures are being reviewed to inform future developments.

- Regarding the delays in Monmouth due to structural work, have we checked with the initial surveyor to see if there were any oversights that could be addressed commercially?

The issue of structural work delays in Monmouth is acknowledged, and it is suggested that any potential oversights by the initial surveyor should be addressed to mitigate costs.

- Do you think transitioning to non-profit care will save money, given the significant costs of providing care?

The business cases presented to the cabinet have demonstrated the potential for cost savings through non-profit care. The focus is on providing high-quality placements in a cost-effective manner, without the need to generate profit.

- How is the non-profit angle working with cross-border collaborations, especially with areas like Gloucestershire, Herefordshire, and Bristol?

Cross-border collaborations are complex due to registration requirements, but efforts are being made to share placements regionally and improve mechanisms for regional cooperation.

- How are you monitoring and keeping control of the impact on young people, particularly care leavers, during this transition period?

The impact on young people is managed through close engagement, honest communication, and support during transitions. Social workers are trained to handle uncertainties and ensure that young people are well-supported throughout the process.

- Are we able to measure the success of the placements beyond occupancy and cost metrics, such as educational attainment and transition to independence?

Success is measured through various criteria, including stability in placements, readiness for independent living, and direct feedback from children and young people. External evaluations by CIW also play a role.

- Do we have many children currently in profit placements, and how will we transition them to non-profit placements in time for Welsh Government deadlines?

The number of children in profit placements is significant, especially in independent fostering agencies. Transition plans are in place for each child to ensure compliance with future non-profit rules.

- What plans are in place to ensure that third-party providers used for supported accommodation will comply with future non-profit only rules?

Compliance with non-profit rules will be ensured through legal requirements for both placement and provider registration, monitored by CIW and Welsh Government.

- Are we seeing any uptick in fostering to reduce the number of children in care?

There has been a net increase in fostering households, and efforts continue to recruit more in-house foster carers, which is crucial for reducing the number of children in care.

- Do you think transitioning to non-profit providers will save money?

The business cases presented to the cabinet for each project have demonstrated the capacity to save money. Over time, the financial impact will be more evident, but the primary focus is on providing quality placements for children and young people.

- How are we monitoring and keeping control of how the transition period is affecting the young people we are here to provide care for?

Monitoring the impact on young people involves evaluating placement stability, planned versus unplanned ends, and direct feedback from the children themselves. Additionally, external evaluations by CIW will provide an independent overview of placement effectiveness.

Chair's Conclusion:

The Chair thanked the officers and Cabinet Member for the report and their responses to the committee's questions and wished the team every success in implementing the new strategy.

5. Investment and Commercial Interests Update

Cabinet Member Ben Callard introduced the report and answered the members' questions with Nick Keyse.

Members' Questions:

- At what stage does MCC look at investments like Castlegate Business Park and decide they are no longer working and take action?

The decision to review investments like Castlegate Business Park is based on the asset investment policy, which sets a 2% return on investment target. The ongoing management involves assessing risks and attractiveness of the space. If tenants vacate, the space is considered for re-letting based on demand. The decision to take further action would depend on the continued assessment of these factors.

- Regarding the farms, is the policy still for the Council to hold on to Council farms?

The policy is to hold on to Council farms as they are considered valuable assets for delivering various policy objectives, such as locally grown food and regenerative agriculture.

- How do we feel about the stability of Cineworld as a tenant for Newport?

The stability of Cineworld as a tenant for Newport Leisure Park is being monitored, and the report reflects adjustments in projections based on their current situation. Specific details about their stability are commercially sensitive.

- Do you feel there is more potential for risk from arrears for rental, either farm or commercial from Castlegate or Newport?

Rent arrears are being managed, with ongoing negotiations and actions to recover payments. The report indicates that arrears are within a manageable range, and steps are being taken to address non-payment issues.

- Where would the EV charging be in Newport Retail Park?

The EV charging bays are expected to be located between Cineworld and Harvester, as this area has the best frontage and visibility.

- Has there been any progress in moving MCC business to the site adjacent to the Solar Farm?

The land surrounding the Solar Farm is being promoted as part of the replacement LDP. Any future development for MCC business will depend on the planning process.

Chair's Conclusion:

The Chair thanked the officers and Cabinet Member for the report and their responses to the committee's questions.

6. Council and Cabinet Work Planner

Councillor Bond requested that more information be included on items in the Planner; in particular, how reports and decisions listed will affect residents. She also reminded officers of the intention to scrutinise

grant funding following the call-in to People committee of the decision regarding the Shared Prosperity Fund – **ACTIONS**

7. Performance and Overview Scrutiny Forward Work Programme

A reminder of the Special meeting on 3rd June and Members' workshop on 16th June.

8. Minutes of the previous meeting

The minutes were agreed.

9. Next Meeting: 3rd June 2025 (Special), 10th June 2025

The meeting ended at **1.23 pm**

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Monmouthshire Select Committee Minutes

Meeting of Performance and Overview Scrutiny Committee held at Council Chamber, County Hall, The Rhadyr USK on Tuesday, 3rd June, 2025 at 10.00 am

Councillors Present

County Councillor Alistair Neill, (Chair)
County Councillor Rachel Buckler, (Vice Chair)

County Councillors: Jill Bond, John Crook, Steven Garratt, Meirion Howells, M. Newell, Paul Pavia, Peter Strong, and Ann Webb

Also in attendance County Councillors:
Ben Callard, Cabinet Member for Resources and
Laura Wright, Cabinet Member for Education

Officers in Attendance

Hazel Ilett, Scrutiny Manager
Robert McGowan, Policy and Scrutiny Officer
Richard Jones, Performance and Data Insight Manager
Hannah Carter, Performance Analyst
Jacquelyn Elias, Principal ALN Officer
Morwenna Wagstaff, Head of Service , Inclusion
Lucie Doyle, Educational Psychologist
Hayley Page, Additional Learning Provision and Partnership Lead

APOLOGIES: None

1. Election of Chair

Councillor Alistair Neill was proposed by Councillor Rachel Buckler, seconded by Councillor Peter Strong.
All were in favour: Councillor Neill was elected as Chair.

2. Appointment of Vice Chair

Councillor Rachel Buckler was proposed by Councillor Martin Newell, seconded by Councillor Paul Pavia.
All were in favour: Councillor Buckler was elected as Vice-Chair.

3. Declarations of Interest

None.

4. Additional Learning Provision / Specialist Resource Bases -Scrutiny of MCC ALP / SRBs in line with the expectations of the Additional Learning Needs Code for Wales 2021 (12 month follow up)

Dr Morwenna Wagstaff introduced the report, Jacquelyn Elias and Hayley Page delivered a presentation, and they answered the members' questions:

- The Chair requested that acronyms and initials be properly explained in reports and asked about the possible stigmatising effect of terminology.
The team acknowledged the importance of avoiding acronyms and stigmatising terminology in reports.
- A member asked about the additional learning provision and partnership lead role, evidence for statements in the report, and numbers of children in the service.

The additional learning provision and partnership lead role was initially a two-year secondment, extended for another year. The role is funded by Welsh Government grant funding. Evidence for improvements comes from the additional learning provision reviews conducted in 2023 and 2025, with summary reports and action plans available. There are currently 194 children placed in specialist resource bases, with a total of 229 available spaces.

- A request was made for evidence to support statements in the report.
*Summary reports of the additional learning provision reviews and action plans can be shared, and the team will consider making these available on the external site – **ACTION***
- The Chair asked to what extent terminology is used within range of the pupils, thinking in terms of stigma.
Efforts are made to ensure children in Specialist Resource Bases feel part of their host school community, and the language used within schools is more inclusive.
- A member asked about annual spending on out-of-county placements, the quality of individual development plans (IDPs), and funding models for Specialist Resource Bases.
Annual spending on out-of-county placements is approximately £2.3 million, excluding transport costs. The Council aims to reduce this figure by developing more local provision to keep children within their communities, which also helps to reduce transport costs. The quality of IDPs varies, and there is ongoing work to ensure consistency through cluster meetings and sharing best practices. Funding models for Specialist Resource Bases are being reviewed to ensure they reflect actual needs and staffing demands. Partnership agreements have been developed with host schools.
- The Chair asked if transport dependency has changed in light of home to school legislation changes?
*Transport dependency has not changed following the home-to-school legislation changes. This is because there remains a statutory entitlement to transport for children attending specialist provisions. The local authority continues to work closely with the pupil transport unit to identify efficiencies. Where appropriate, families are offered personal transport budgets if they choose to transport their children themselves. However, decisions are needs-led and based on what's best for the child and family. The high cost of transporting children with disabilities – particularly out of county – also motivates efforts to develop more local specialist provision – **ACTION: to provide transport costs***
- Clarity was sought about the number of pupils currently in out-of-county provision.
There are currently 55 pupils in out-of-county independent or specialist provisions.
- A member asked about the impact of travel time on attendance and well-being, capturing learner and family experiences, and risk of non-compliance with legislation.
Travel time is carefully considered, and its impact on attendance and well-being is monitored through regular reviews. Strategies are in place to support children during travel, and efforts are made to keep children as close to their communities as possible. Learner and family experiences are captured through annual reviews, one-page profiles, and ongoing communication. Non-speaking children's views are gathered creatively, involving parents and professionals. The team is confident in their compliance with the ALN Act and its requirements, ensuring all old statements are converted to IDPs by the deadline.
- A member asked about out-of-county placements in England and whether Monmouthshire hosts any.
Out-of-county placements in England are considered when appropriate, and Monmouthshire does host children from neighbouring counties in its specialist resource bases.

- A member asked if the recommendations from the previous year's report were achieved, and if any were carried over to the current report.
*Some recommendations from the previous year are ongoing or progressing, and the detailed report will be shared as soon as possible – **ACTION: to provide further detail previously supplied as an appendix***
- A member asked how the Council is mitigating the impact of budgetary pressures on additional learning needs coordinators and support staff.
The Council supports schools through professional learning and development programs, regular forums for additional learning needs coordinators, and ongoing training for support staff.
- A member asked how the Council plans to meet increased demand from pupils with social, emotional, and mental health challenges and neurodevelopmental needs.
The Council is aware of the growing needs and is working on forecasting and projecting support for these learners. They have implemented the Autism in Schools and Settings programme and ensure that needs are met regardless of diagnosis.
- The Chair asked if, in practice, a child could be placed on a pathway without a diagnosis.
Yes, a child can be placed on a pathway without a diagnosis. The approach is needs-led and person-centred, focusing on the individual child's barriers to learning rather than requiring a formal diagnosis. Tools like the one-page profile help identify what support is needed based on how the child presents. For example, a child who later receives an autism diagnosis might initially receive support for speech and communication needs. Provision is tailored and monitored over time in partnership with the child and their family. The model emphasises inclusive, high-quality teaching and strategies that benefit all learners, regardless of diagnosis, with more specialist interventions used only when necessary.
- A member asked what the criteria are for pupils to go to the bases, and whether they need a statement.
Pupils accessing Specialist Resource Bases typically have a statutory plan, such as an individual development plan, reflecting their additional learning needs. These placements are determined by a panel.
- A member asked if the Monmouthshire model has removed the need for parents to go through long appeal processes to get a statement of special educational needs.
While the model aims to meet needs effectively, there are still processes in place for appeals. Currently, there are no ongoing appeals for placements in Specialist Resource Bases. The Council works closely with parents to resolve disagreements, often using mediation and disagreement resolution.
- A member asked if there are any plans to provide our own specialist provisions given the reliance on out-of-county placements and rising needs.
The Council considers their network of Specialist Resource Bases as their special school. They believe in keeping children close to their communities and feel that their current model is effective. They are one of only two local authorities in Wales without a discrete special school building.

Chair's Summary:

The Chair thanked the officers for the report and their responses to the committee's questions and wished to extend the committee's appreciation for the team's valuable work.

5. Supporting Vulnerable Learners - Scrutiny of the effectiveness of approaches in supporting the needs of vulnerable learners (12 month follow up)

Dr Morwenna Wagstaff introduced the report and answered the members' questions with Dr Lucie Doyle, Jacquelyn Elias and Hayley Page:

- A member asked if ELSA training is available to all pupils, and if we are promoting emotional literacy in schools.

ELSA (Emotional Literacy Support Assistant) training is for staff, not pupils, but emotional literacy support is available to all pupils. ELSA training is targeted at teaching assistants, and every school in Monmouthshire has at least one trained ELSA. While the training itself isn't for pupils, schools use it to deliver time-limited interventions and ongoing support like morning check-ins. Additionally, there's a broader commitment to emotional well-being through the Healthy Settings service, aligned with Welsh Government's statutory framework. This includes action plans for schools to become emotionally healthy environments. Universal, trauma-informed professional learning is also offered to ensure all pupils benefit from inclusive, preventative approaches.

- A member asked for more qualitative and quantitative information about the 68 to 70 placements that have been maintained.

The 68 to 70 placements refer to the number of children who have been maintained in their current placements due to the support provided. The Council is working on providing more detailed qualitative and quantitative information in their reports.

- More information on the risks or concerns mentioned in the report was sought, specifically regarding schools having the time and commitment to changing processes, and the over-reliance on grant funding.

The concerns highlighted in the report include:

- *Time and Commitment: Schools face pressures on the availability of support staff, which can impact how situations are responded to, especially with children presenting distress or dysregulation. The Council supports schools with ongoing professional development and training.*
- *Changing Processes: Schools are in the process of aligning with new statutory frameworks and guidance around emotional health and well-being, which requires changes in policies and practices.*
- *Over-reliance on Grant Funding: The trauma-informed work initiated post-COVID is funded by Welsh Government grants, which are provided on a year-by-year basis. The Council is developing an in-house model of professional learning and training to ensure sustainability should the grant funding end.*

- It was noted that additional reports that are linked in the main report can't be opened – **ACTION**
- A member asked for more information about the concerns in 3.4.10.

The key issues include staffing pressures, systemic change and funding uncertainty. There is a risk that schools may not always have enough emotionally attuned adults available to support children in distress, due to limited support staff. Schools are adapting to new statutory frameworks on emotional health and well-being, which requires ongoing support from the local authority to align policies and practices. Much of the trauma-informed work began with Welsh Government COVID-related well-being grants. While this funding continues, it's allocated annually, creating uncertainty. In response, Monmouthshire is developing a sustainable in-house training model in partnership with Traumatic Stress Wales to ensure continuity if external funding ends.

- A member asked about the provision of educational psychologists, and whether officers feel they can manage the expectations from parents and schools.
There is a national shortage of educational psychologists, but Monmouthshire is fortunate to have a full team. They support Cardiff University, including by having trainee educational psychologists work with the team. The team engages in preventative work and offers professional learning to schools. Each school has a link educational psychologist who works closely with the additional learning needs coordinator to prioritise individual young people. The service also offers various ways for schools to access support, including anonymous consultations and problem-solving sessions.
- A member asked if, in future, numbers or percentages be given in place of words like 'most' and 'many', e.g. in 3.5.2.
The language used in the reports follows Estyn's standardised terminology. This language is intentionally used because it aligns with Estyn's quantifiable categorisation system and reflects expected inspection language. Clarifying these terms and quantifying their meaning can form part of the glossary that will be created and included in future reports.
- A member asked what provisions are in place for the one pupil not covered by the figures in 3.7.6.
The apparent omission was due to a wording issue in the report. The pupil in question was supported through a managed move to another mainstream school. So, all pupils were accounted for; the confusion arose from how the sentence was structured.
- A member asked if there any special provisions provided for our children looked after.
The Council prioritises children who are looked after within all their provisions for vulnerable learners. They have a vulnerable learner lead role and a statutory officer specifically responsible for children looked after. These children are given priority access to services such as the education support team and the educational psychology service.

Chair's Summary:

The Chair thanked the officers for the report and their responses to the committee's questions and reiterated the committee's appreciation for the team's work.

6. Risk Register Update - To update members on the Council's Risk Register and to agree any future areas for scrutiny.

Richard Jones introduced the report and answered the members' questions with Cabinet Member Ben Callard:

- A member asked for more detail on the identification of major, substantial, moderate, minor, and likely, probable, and unlikely risks.
*The identification of these risks is underpinned by the strategic risk management policy, which includes categorisation of different levels of impact and probability. This policy can be shared with the committee for further clarity – **ACTION: to send further detail***
- A member asked who checks the equivalence of these assessments, and how consistency is applied.
The risk assessments are initially identified in service business plans and reviewed by the senior leadership team. They ensure the assessments are robust and consistent, guided by the risk management policy.
- A member asked if there is a risk matrix that shows how risks like major adult social care provider failure fit into the risk register.

The risk radar identifies potential risks that could impact the Council or the community. The strategic risk register focuses on high or medium-level risks to the delivery of objectives. Specific risks like adult social care failure are considered and can be escalated if needed.

- A member reiterated the request for more detail on the forward work plan to understand the impact on residents and identify what needs to be scrutinised.

*The comments will be fed back to those responsible for coordinating the work planner to consider when updating it – **ACTION: to follow up with SLT***

- A member asked if the criteria for risk identification could be appended to the document for residents to understand without searching for another document.

A summary of the different levels of categorisation used to inform the risk assessments can be included in future reports.

- A member asked if there a lack of mitigation detail in the risk register, and if there are specific mitigation actions, progress to date, or timescales?

The risk register captures significant mitigations in place to address risks. More detailed mitigations may be found in directorate risk registers and service plans. The key mitigations are included in the strategic risk register to ensure they are maintained and up to date.

- A member asked if there is an underdeveloped link between risk and budget, and how budget implications or reserve strategies are captured.

The risk register identifies specific risks related to finances. It informs budget considerations and decision-making, ensuring that risks are taken into account within the limited resources available.

- A member asked how the climate emergency is integrated into the risk register and Council budgets and plans?

The risk register identifies risks related to the climate and nature emergency, which are linked to the objectives in the Community Corporate Plan. The register captures significant mitigations and considers how risks integrate with other priorities and plans.

- A member asked why the threat of legal challenges has been de-escalated, given the increasingly litigious nature of society.

The risk of legal challenges has not necessarily diminished but will be managed within the legal team's directorate risk register. This ensures that specific risks are managed at the appropriate level and can be escalated if needed.

- A member asked if the implication is that there is less threat of legal challenge, or that our ability to deal with such risks has improved.

The implication is that our ability to deal with legal challenges has improved, allowing the risk to be managed at the directorate level rather than as a strategic risk.

- The Chair asked how the financial risk can be graded as having reduced if the financial pressures and medium-term financial gap have increased?

The financial risk grading reflects the overall management and mitigation efforts. While the financial pressures and gap have increased, the Council's ability to manage these risks has improved, leading to a reduced risk grading. The upcoming outturn report will provide further details on the financial position.

- The Chair asked how the risk of increasing school deficits is being addressed in the risk register?

The risk of increasing school deficits is considered within the broader financial risks and is managed through ongoing financial oversight and support to schools. The specific details of school reserves and deficits will be addressed in the outturn report.

- The Chair asked how risks are prioritised, such as comparing the risk of not meeting Net Zero by 2030 with the risk of not returning school attendance to pre-pandemic levels?
The risk register assesses each risk based on its specific impact and likelihood. The prioritisation of risks considers the Council's capacity to influence and mitigate them. While both risks are important, the Council's ability to address them may differ, influencing their prioritisation.
- The Chair further asked if we really understand the consequences of non-attendance at school –
ACTION: to provide detail as to how and why 9B, the risk of school non-attendance, is at Medium (8), given its importance
- A member noted the reduction in the risk score for item 11B – from 16 to 12 – being questionable given ongoing risks of flooding in areas like Caldicot.

Chair's Summary:

The Chair thanked the officers and Cabinet Member. He emphasised the importance of the risk register in identifying and managing strategic risks to the organisation. He highlighted the need to understand the risk environment, the progress of mitigations, and the potential need to refer issues to other committees. He noted the key changes in the risk register, including adjustments to workforce risk, reduction in school attendance risk, division of climate risk, and de-escalation of two risks to directorate risk registers.

7. Date of Next Meeting: 10th June 2025

The meeting ended at **12.38 pm**

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Monmouthshire Select Committee Minutes

Meeting of Performance and Overview Scrutiny Committee held at Council Chamber, County Hall, The Rhadyr USK on Tuesday, 10th June, 2025 at 10.00 am

Councillors Present

County Councillor Alistair Neill (Chair)

County Councillors: Jill Bond, Rachel Buckler, John Crook, Meirion Howells, M. Newell, Paul Pavia, Peter Strong, Angela Sandles and Tudor Thomas

Officers in Attendance

Hazel Ilett, Scrutiny Manager
Robert McGowan, Policy and Scrutiny Officer
Jane Rodgers, Chief Officer for Social Care, Safeguarding and Health
Nia Roberts, Welsh Language Officer
Pennie Walker, Equality & Welsh Language Manager
Huw Owen, Principal Environment Health Officer (Public Health)
Alun Thomas, Principal Environmental Health Officer
Jennifer Walton, Registration Service Manager
Gareth Walters, Trading Standards & Animal Health Team Leader
Kristian Williams, Public Protection

APOLOGIES: Councillor Steven Garratt

1. Apologies for Absence

Steven Garratt, Tudor Thomas as substitute.

2. Declarations of Interest

Councillor Howells declared a pecuniary interest in Item 5 as his wife's business has made an Osteopathic dry needling application under special procedures.

3. Public Open Forum

None.

4. Welsh Language Annual Report 2024-25 - To scrutinise the Council's performance

Cabinet Member Angela Sandles and Pennie Walker introduced the report. Nia Roberts answered the members' questions with Pennie Walker:

- *What is the latest situation regarding the 3 options for more cost-effective delivery models?*

The most desirable option currently is to join with Torfaen for translation services. This is due to the similarities in the types of documents translated, which would make the

process more efficient and consistent. The collaboration with Torfaen is still being finalised to ensure smooth operations.

- *What is a 'non-opinion review' under internal audit?*

A non-opinion review is an internal audit that helps identify areas of compliance and non-compliance with Welsh language standards. It is not an official audit but provides valuable insights for developing an action plan to address areas needing improvement.

- *Is there a target for compliance with Welsh language standards?*

The aim is always 100% compliance, although it may not always be achievable. The non-opinion review helps identify areas for improvement, and regular monitoring is conducted to resolve issues as they arise.

- *In the list of standards, some are missing e.g. 23, 69, 85, 94-8 – are they not relevant?*

The report is guided by the Welsh language Commissioner's guidelines, which determine the included standards. Officers can provide updates on any standards not covered in the report.

- *Of the 53 staff who completed courses in 24/25, at what level were these courses?*

36 staff members completed the beginner level (Mynediad) and 12 completed the foundation level (Sylfaen).

- *How will you ensure that the Welsh and English versions of the website and apps remain aligned in content and functionality?*

There are challenges in maintaining consistency between Welsh and English versions of digital platforms. Regular monitoring, training, and communication with the website officer help to maintain consistency and ensure alignment.

- *If someone wanted to speak in Welsh to someone at a senior level, to whom could they speak?*

It would be difficult to find a senior-level person who can speak Welsh fluently. Learning Welsh is a significant commitment, and officers are working on improving resources to help senior leadership integrate more Welsh into their work.

- *The member noted a recent fire incident in Abergavenny for which the council couldn't provide a Welsh speaker to speak to S4C. He emphasised the importance of having someone who can speak Welsh to the media.*
- *How successful have initiatives such as lanyards to identify learners, the Cymraeg Teams channel etc. been? Are there any further plans to promote them?*

Lanyards have been effective in identifying Welsh speakers and learners, making it easier to recognise and engage with them. Welsh language course participation is increasing annually, indicating growing interest and impact. Welsh tips in the staff newsletter receive positive engagement, often prompting follow-up questions from staff. Feedback from course participants shows they enjoy the sessions but want more opportunities to use Welsh at work, and therefore future plans include exploring new initiatives to create more opportunities for staff to use Welsh. Welsh language celebration days like Shwmae Day are recognised, though planning can be challenging due to limited resources.

- *Are there opportunities to work within Monmouthshire with other public authorities like police, Fire and Rescue, NHS to share practices and improve Welsh language services?*

Monmouthshire is part of the Welsh language officer group in Southeast Wales, where they share good practices. They also collaborate on the "More than just words" social care plan to ensure the active offer is given.

- *A member expressed a desire to work with officers outside the meeting on how to push out learning to the wider community, given the strong appetite in the general public to learn, to which the officers agreed.*
- *The report mentions 176 Welsh standards – there's nothing that displays how much this work costs residents, given that the vast majority of them aren't Welsh speakers. Is there a reason why we don't collate what this work costs?*

The main cost associated with Welsh language compliance is translation, which has consistently gone over budget. The council is exploring joining the Torfaen service to help reduce these costs. Other costs include the present officers' salaries, but most compliance work is integrated into the day-to-day responsibilities of all council officers, so it isn't tracked separately. That's why a full cost breakdown isn't collated. The total cost for last year was £226,940.95.

- *With the development of AI, is there a possibility of using it for translation purposes? Does it offer new opportunities to bring costs down after an initial investment?*

AI does present opportunities to lower translation costs, but it can't fully replace human translators due to the need for proofreading to ensure accuracy. Currently, translations are outsourced and charged per word, which limits the ability to integrate AI directly into the process. However, other councils like Torfaen use tools such as translation memory systems that recall previously translated content, which helps reduce effort and cost. Exploring similar systems could offer future savings, especially as the council looks to stay within budget.

Chair's Summary:

Thank you to the Cabinet Member and officers. The report was moved.

5. Public Protection Performance 2024/25 - To review the performance of the service area

Jane Rodgers, Alun Thomas, Kristian Williams, Huw Owen and Gareth Walters introduced the report and answered the members' questions:

- *Can you give more information on high-risk premises inspections? Are some food outlets more high-risk than others?*

High-risk food premises are categorised based on the nature of the food they produce, the risk of cross-contamination, and the level of compliance. High-risk categories include manufacturers, butcher shops, and takeaways, with inspection frequencies varying from every six months to 18 months depending on the risk level.

- *Why has there been a fall in FOI requests this year?*

The fall in FOI requests is partly due to a particularly difficult case the previous year that generated significant social media interest. While the number of FOI requests has decreased, it remains higher than in previous years.

- *What is the threshold for an event needing to be referred to the Event Safety Advisory Group (ESAG)?*

There is no specific threshold for referring an event to ESAG. The process is voluntary, and larger or riskier events are encouraged to notify ESAG. The group responds based on the risk and works closely with fire and police services to ensure safety.

- *Can you discuss the impact of the unfilled head of public protection post on strategic oversight?*

The vacancy of the head of public protection post is acknowledged and is under review by the senior leadership team, with potential options being considered to address the gap.

- *There seems to be a decline in performance in some key areas like fly-tipping and noise complaints. What actions are being taken to improve response times and resolution?*

The decline in performance is due to an increasing workload and the need to prioritise certain tasks. The team is focusing on outcomes and risk assessment to manage the workload effectively.

- *Are you being proactive in addressing concerns about housing above takeaways, particularly regarding overcrowding and fire safety?*

While officers did not fully deliver on housing above takeaways inspections last year, it is a priority for the current year.

- *Have you seen an increase in animal welfare concerns?*

There has been an increase in animal welfare issues, particularly in farm-based animals, due to the cost-of-living crisis. There are challenges in dealing with these cases, including the need for resources and the importance of working with government to address the issues.

- *344 notifiable diseases are listed – do we have individual figures for E.Coli, in particular? What level of investigation goes into identifying the sources of these incidents?*

Yes, figures can be broken down by individual diseases like E. coli, Salmonella, and Campylobacter. Each case is investigated thoroughly, with a history taken based on the specific pathogen's incubation period. For example, Campylobacter investigations may look back 11 days to assess food history, animal contact, swimming in rivers, and other exposures. Investigations are logged in a shared database called Taran, which allows tagging of potential sources. This helps identify patterns across cases—such as multiple people visiting the same location—triggering further investigation if a common source is suspected.

- *Do you have enough resources to handle the enforcement issue of single-use vapes?*

The significant enforcement issue of single-use vapes is a challenge, and Welsh Government has been proactive in providing information and support. There are also challenges relating to the circumvention of legislation and the need for additional resources.

- *How will you address the challenge of online purchasing of single-use vapes?*

The online purchasing of single-use vapes is a significant challenge, and efforts are being made to address it through regional approaches and collaboration with HMRC and other authorities.

- *With reactive service demand continuing to rise, what actions are being taken to protect and prioritise proactive work, especially in areas like private housing standards?*

The team is constantly balancing reactive and proactive work, with a focus on maximizing public health outcomes. The team prioritises based on risk assessment and service plans, ensuring that important proactive work, like housing above takeaways, is addressed.

- *Are there any other areas where proactive work has been reduced or postponed due to service pressures, and what are the risk implications of that?*

Some proactive work, such as housing above takeaways, was postponed due to reactive work demands. The team is aware of the risks and is focusing on delivering these important areas in the current year.

- *What mechanisms are in place to regularly review and rebalance priorities through the year as demand fluctuates?*

The team regularly reviews and rebalances priorities based on daily risk assessments and service plans, ensuring that both reactive and proactive work are managed effectively.

- *How are staff kept safe with enforcement at premises and at what stage are the Police involved?*

Staff are protected through risk assessments and, when necessary, the involvement of the police. They also have measures such as sending two officers for corroboration and backup in contentious visits. There is an upcoming visit where the police will be involved.

Chair's Summary:

This is very important work for our residents, for which the committee is very grateful – please pass that on to every member of staff. Thank you to the officers for the report and their responses today. The report was moved.

6. Registration Services Annual Report 2024/25 - To review the performance of the service area

Jane Rodgers and Jennifer Walton introduced the report and answered the members' questions:

- *Regarding the percentage of registrations within statutory time for both births and deaths, are there issues affecting delivery for people suffering after the death of someone?*

The lower percentage for births is due to the small number of births in Monmouthshire, where each birth has a significant percentage impact. For deaths, the new statutory process involving the medical examiner's role has affected the numbers. Officers are confident that next year the targets will be met as the new process becomes more embedded.

- *Is there a reason for the remarkable statistic of Monmouthshire having the highest percentage increase in wedding ceremonies from 2019 to 2022?*

The initial increase in wedding ceremonies was due to the backlog from COVID restrictions. Monmouthshire has become a popular destination for weddings, attracting people from across the country due to its beautiful venues.

- *There are constant developments in legislation and changes in the local environment – what do these changes mean and is there any specific legislation in the pipeline?*

Upcoming changes are mostly technical, aiming to digitise the registration process, which is currently very paper-based. These changes are expected to take effect in the future, but the exact timeline is uncertain.

- *Is there system pressure during peak season, with ceremonial staff being part-time, and what is the impact on service?*

Managing demands during the summer is challenging, but the team members deserve praise for their support and flexibility – despite the pressure, they have never failed to conduct a ceremony. The team enjoys their work and supports each other, ensuring appointments are offered within statutory timeframes.

- *What are your views on the government response to the Law Commission's review on marriage law reforms, and are you concerned about the lack of progress?*

There has been no response from the government yet, and the recommendations are still under review. Registrars will continue to play a role in identifying predatory, sham, forced, and coerced marriages. The exact changes and their implementation are uncertain, but the team will manage them as they come.

- *Can you clarify the number of births and deaths within Monmouthshire i.e. 633 births and 1019 deaths? Are these numbers actual in the county?*

The actual number of births within Monmouthshire was 21, while the 633 figure includes births registered on behalf of Torfaen. The 1019 deaths figure represents actual deaths within Monmouthshire.

Chair's Summary:

Thank you to the officers for the report and their responses, and please pass thanks to the wider team. The report was moved.

7. Council and Cabinet Work Planner

8. Performance and Overview Scrutiny Forward Work Programme and Action List

Councillor Bond reminded officers of the request to scrutinise Grants, particularly in light of the SPF, and the SRN. Officers noted the number of full meeting agendas through to next year and the likelihood of needing to call further special meetings to accommodate extra items.

9. To confirm the minutes of the previous meeting

The minutes were agreed.

10. Next Meeting

9th July 2025 at 10.00am (Special Meeting).

The meeting ended at 12.08 pm.

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