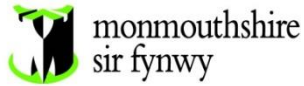


Public Document Pack



Neuadd y Sir
Y Rhadyr
Brynbuga
NP15 1GA

County Hall
Rhadyr
Usk
NP15 1GA

Tuesday, 7 October 2025

Dear Councillor

CABINET

You are requested to attend a **Cabinet** meeting to be held at **Steve Greenslade Room, County Hall, Usk** on **Wednesday, 15th October, 2025**, at **4.30 pm**.

AGENDA

1. Apologies for Absence
2. Declarations of Interest
3. Performance and Overview Scrutiny Committee ~ Feedback to Cabinet of Meeting held on 23rd September 2025 1 - 4
4. A Whole Authority Preventative Strategy for Supporting Resilient, Healthier Communities 5 - 22

Division/Wards Affected: All

Purpose: To develop a preventative strategy, for adoption across the whole authority, aimed at supporting resilient, healthier communities.

Author: Jane Rodgers, Strategic Director

Contact Details: janerodgers@monmouthshire.gov.uk

5. Connect To Work Supported Employment Programme 23 - 44

Division/Wards Affected: All

Purpose: To inform Cabinet of the Connect to Work programme and proposed Lead Local Authority – Cardiff City Council to act as the accountable body to manage and administer the grant from the Department of Work and Pensions (DWP).

Author: Rory Clifford Adult Employment & Skills Lead

Contact Details: roryclifford@monmouthshire.gov.uk

6. 2025/26 REVENUE BUDGET - FINANCIAL UPDATE 45 - 84

Division/Wards Affected: All

Purpose: To provide Cabinet with an update of the progress against the Councils revenue budget for the 2025/26 financial year.

Author: Jonathan Davies, Head of Finance (Deputy Section 151 officer)

Contact Details: jonathandavies2@monmouthshire.gov.uk

Yours sincerely,

Paul Matthews
Chief Executive

CABINET PORTFOLIOS

County Councillor	Area of Responsibility	Ward
Mary Ann Brocklesby	<p>Leader Lead Officers – Paul Matthews, Matthew Gatehouse, Peter Davies, Will Mclean</p> <p>Whole Authority Strategy and Direction Whole authority performance review and evaluation, including DDAT Relationships with Welsh Government, UK Government and local government associations Regional Relationships including CJsCs. PSBs and cross boarder Emergency Planning</p>	Llanelly
Paul Griffiths	<p>Cabinet Member for Planning and Economic Development Deputy Leader Lead Officers – Will McLean, Craig O'Connor</p> <p>Economic Strategy Skills and Employment Replacement Local Development Plan Placemaking and the development of market and affordable housing Placemaking and Transforming Towns Car parking and civil parking enforcement Development Management Building Control</p>	Chepstow Castle & Larkfield
Ben Callard	<p>Cabinet Member for Resources Lead Officers – Peter Davies, Matt Gatehouse</p> <p>Finance including MTFP and annual budget cycle Revenue and Benefits Human resources, payroll, health and safety Land and buildings Property maintenance and management Strategic procurement</p>	Llanfoist & Govilon
Laura Wright	<p>Cabinet Member for Education Lead Officers – Will McLean, Ian Saunders</p> <p>Early Years Education All age statutory education Additional learning needs/inclusion Post 16 and adult education School standards and improvement</p>	Grofield

	<p>Community learning Sustainable communities for learning Programme Youth service School transport</p>	
Ian Chandler	<p>Cabinet Member for Social Care, Safeguarding and Accessible Health Services Lead Officer – Jane Rodgers</p> <p>Children’s services Fostering & adoption Youth Offending service Adult services Whole authority safeguarding (children and adults) Disabilities Mental health Wellbeing Relationships with health providers and access to health provision</p>	Llantilio Crossenny
Catrin Maby	<p>Cabinet Member for Climate Change and the Environment Lead Officers – Debra Hill-Howells, Craig O’Connor, Ian Saunders</p> <p>Decarbonisation Transport Planning Highways and MCC Fleet Waste management, street care, litter, public spaces and parks Pavements and Back lanes Flood Alleviation Green Infrastructure, Biodiversity and River health</p>	Drybridge
Angela Sandles	<p>Cabinet Member for Equalities and Engagement Lead Officers – Matthew Gatehouse, Ian Saunders, Jane Rogers, James Williams</p> <p>Community development, inequality and poverty (health, income, nutrition, disadvantage, discrimination, isolation and cost of living crisis) Citizen engagement and democracy promotion including working with voluntary organisations Citizen experience - community hubs, contact centre, and customer service and registrars, communications, public relations and marketing Leisure centres, play and sport Public conveniences Electoral Services and constitution review Ethics and standards Welsh Language Trading Standards, Environmental Health, Public Protection, and Licencing</p>	Magor East with Undy

Sara Burch	<p>Cabinet Member for Rural Affairs, Housing & Tourism</p> <p>Lead Officers – Craig O'Connor, Ian Saunders</p> <p>Local Food production and consumption, including agroforestry and local horticulture</p> <p>Homelessness, Temporary accommodation, private sector housing, (empty homes leasing schemes, home improvement loans, disabled facilities grants and adaptive technology),</p> <p>Allocation of social housing</p> <p>Broadband connectivity</p> <p>Active Travel</p> <p>Countryside Access and Rights of Way</p> <p>Tourism Development and Cultural Services</p>	Cantref
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Aims and Values of Monmouthshire County Council

Our purpose

To become a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life.

Objectives we are working towards

- Fair place to live where the effects of inequality and poverty have been reduced;
- Green place to live and work with reduced carbon emissions and making a positive contribution to addressing the climate and nature emergency;
- Thriving and ambitious place, where there are vibrant town centres and where businesses can grow and develop
- Safe place to live where people have a home where they feel secure in;
- Connected place where people feel part of a community and are valued;
- Learning place where everybody has the opportunity to reach their potential

Our Values

Openness. We are open and honest. People have the chance to get involved in decisions that affect them, tell us what matters and do things for themselves/their communities. If we cannot do something to help, we'll say so; if it will take a while to get the answer we'll explain why; if we can't answer immediately we'll try to connect you to the people who can help – building trust and engagement is a key foundation.

Fairness. We provide fair chances, to help people and communities thrive. If something does not seem fair, we will listen and help explain why. We will always try to treat everyone fairly and consistently. We cannot always make everyone happy, but will commit to listening and explaining why we did what we did.

Flexibility. We will continue to change and be flexible to enable delivery of the most effective and efficient services. This means a genuine commitment to working with everyone to embrace new ways of working.

Teamwork. We will work with you and our partners to support and inspire everyone to get involved so we can achieve great things together. We don't see ourselves as the 'fixers' or problem-solvers, but we will make the best of the ideas, assets and resources available to make sure we do the things that most positively impact our people and places.

Kindness: We will show kindness to all those we work with putting the importance of relationships and the connections we have with one another at the heart of all interactions.

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Monmouthshire Scrutiny

Performance and Overview Scrutiny Committee ~ Feedback to Cabinet of Meeting held on 23rd September 2025

Report Item 4: Revenue Monitoring Update

The committee discussed the council's financial position, highlighting ongoing risks such as school reserve balances and the impact of inflation and National Insurance increases on costs. Members raised the need for clearer public communication about council spending, suggesting simplified charts with council tax bills. Updates were provided on overspends at council properties, with explanations that new tenancies and marketing efforts are improving occupancy. The management of staff vacancies was explored, clarifying that not all vacancies are budgeted and that senior sign-off is required for filling posts. The use of solar panels on council properties was considered, with the feasibility depending on building structure and tenant arrangements. Car park overspends were attributed to under-recovery of penalty charges, and recruitment of additional enforcement officers was expected to help. The value of hosting major events was discussed, with economic impact reports to be shared when available. The committee also examined the use of council assets, support for tenants installing renewables, and the ongoing review of staffing levels and well-being. The process for determining staffing in social care was explained as demand-led and regularly reviewed. Enforcement of car parking penalties and debt recovery processes were outlined, and the management of supply teaching costs and school facility use was discussed. Overspends on school transport and public concerns about safe routes were acknowledged as important for communication. The committee also addressed the appropriateness of insurance thresholds for supply teaching. In terms of social care expenditure, increases were linked to service transfers, new responsibilities, and rising demand. The use of contingency funds for National Insurance shortfalls was confirmed, with a need for continued financial discipline. The rise in high-cost care packages was attributed to demographic changes, increased complexity, and shifting health eligibility thresholds, with ongoing discussions between social care and health services.

Report Item 5: Chief Officer for Social Care Annual Report

The annual report for social care was presented, structured around people, prevention, partnerships, and well-being. The benefits of stable leadership and systemic changes in adult services were highlighted, including new pathways for

Monmouthshire Scrutiny

domiciliary care and reablement. Efforts to build long-term sustainability, manage workforce challenges, and adapt to demographic changes were described. In children's services, the focus was on supporting children to remain at home, developing in-house placements, and improving foster carer recruitment and support. The importance of workforce well-being and professional development was emphasised. The chair praised the report's accessibility and the value of sharing it widely. Committee members discussed the proportion of care leavers not in employment, education, or training, noting that all are individually supported. The use of direct payments was explored, with numbers fluctuating due to suitability and recent commissioning changes. Recruitment and retention challenges were noted, particularly in direct services. Safeguards for managing direct payments were outlined, including social worker reviews and support services. Lower adult satisfaction rates compared to the COVID period were discussed, with ongoing efforts to improve communication and quality assurance. The committee examined learning from complaints, support for direct payments, and discrepancies in looked after children numbers. The challenge of meeting future service demand due to demographic changes was acknowledged, with the Local Development Plan aiming to attract younger families and provide affordable housing for care workers. The importance of workforce grants and the risk of future cuts were noted, and improvements in children's and adult social care performance were recognised.

Report Item 6: Safeguarding Annual Report

The safeguarding annual report was introduced, covering arrangements for vulnerable adults and children. The evolving nature of safeguarding was emphasised, with new risks such as exploitation and the ongoing impact of COVID. The report assessed five key domains: governance, workforce, prevention, protection, and safe services, noting strengths and areas for improvement. The committee discussed the rise in harmful sexual behaviour in schools, attributing it to both increased incidence and greater awareness, with online influences and post-COVID complexities contributing. Collaboration with education and youth services was ongoing. The meaning of practitioner concern categories was clarified, and the impact of sharing one-page profiles in the Public Transport Unit was discussed, with follow-up on previous case numbers offered. Amber ratings in the action plan were explained as reflecting ongoing or carried-over actions. The chair commended safeguarding work, suggested clearer labelling of the report as a self-evaluation, and encouraged inclusion of more service user feedback. The link between permanent exclusions in

Monmouthshire Scrutiny

schools and knife carrying/use was questioned, with no clear direct link established and further data to be sought from education colleagues.

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SUBJECT: A Whole Authority Preventative Strategy for Supporting Resilient, Healthier Communities

MEETING: Cabinet

DATE: 15th October 2025

DIVISION/WARDS AFFECTED: All

1. PURPOSE:

To develop a preventative strategy, for adoption across the whole authority, aimed at supporting resilient, healthier communities.

2. RECOMMENDATIONS:

For Cabinet to endorse the strategy 'Living Well Monmouthshire'.

For Cabinet to task officers with implementing the strategy and establishing a programme board to oversee delivery.

3. KEY ISSUES:

3.1 The strategy is intended to support the delivery of the Council's Community and Corporate Plan with specific emphasis on:

- A Fair Place, where the effects of inequality and poverty have been reduced; and
- A Connected Place, where people feel part of a community and valued.

3.2 The overall aim of the strategy is that, *"Residents, especially our more vulnerable and 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."*

3.3 The strategy is building on well-established foundations including:

- The council has strong relationships with key partners including health brought together under the Integrated Services Partnership Board;
- Many parts of the council have developed multi-agency approaches to working preventatively with people;
- Key services, such as Adult Social Care are undertaking programmes of work aligned with the strategy such as the reablement pathway and the provision of information and advice;
- The Integrated Wellbeing Network* is well established in the Local Authority linking with many community-based support organisations;
- There is a strong focus within the Local Authority of keeping physically active, engaging with nature and building peer support;
- The council is seeking to develop data analytics to better understand population needs.

3.4 The introduction of the Living Well strategy is well-timed from a policy perspective and aligns with the Welsh Government ambition to become a Marmot nation. The Future Generations Commission Report (2025) states,

“The Health and Well-being mission is to transform how public bodies in Wales keep people healthy, shifting the focus towards prevention and long-term well-being”.

In similar vein, Investing in a Healthier Wales – Prioritising Prevention (Public Health Wales, 2025) states,

“Despite the fragility of public sector finances, now is the time to prioritise investment in people’s health and well-being. Such investment can reverse the decline in the nation’s health, address the root causes of health inequalities and enable the people of Wales to live longer, healthier and happier lives.”

3.5 In the first instance, the strategy intends to focus on supporting adults who are near to or needing statutory support, with particular attention to those individuals or communities who are the most vulnerable or at risk of ill-health due to social and environmental factors.

3.6 The potential for widening the scope of the strategy to include prevention from a ‘whole-life-course’ perspective was considered but not taken forward at this stage. The decision to maintain a narrower scope in the first instance was based on the following reasons:

- There are other fora currently being developed to ensure all children receive the ‘best start in life’, which would risk duplication of effort;
- Broadening implementation at this point would risk diluting the attention/effort that needs to be brought to bear on ensuring a coordinated preventative approach to adults;
- Starting with a narrower focus provides an opportunity to develop learning before potentially widening out to include other population groups.

3.7 Nevertheless, it is understood that working with communities to reduce inequalities and promote good health and wellbeing outcomes is a long-term objective. This strategy is intended to be viewed as another *step in the right direction* in ensuring a whole life approach.

3.8 Implementation of the strategy will depend on three core working principles: -alignment, targeting and collaboration. The strategy will be delivered via interconnected workstreams taken forward concurrently with an iterative approach to learning and review as the work evolves. Within each workstream, there is an expectation to facilitate and promote the active involvement of others including residents, colleagues, partners, volunteers and organisations involved in community-based support.

3.9 The initial workstreams, which are detailed in appendix 2, illustrate some of the tasks and activities that will be undertaken. The workstreams include:

- Data and Evaluation
- Practice models and service mapping
- Commissioning and the use of community assets
- Partnerships
- The provision of information and advice
- Communications

3.10 For residents, key outcomes that we are seeking include:

- Increase in overall healthy life expectancy;
- People are enabled to live well and independently, preventing and delaying the need for statutory services;
- People are more physically and mentally active, and their overall wellbeing is improved;
- People have easy access to specific information and advice relevant to their health and wellbeing;
- People have access to individualised community-based support to help them improve their long-term wellbeing;
- People have more (social) interactions and more opportunities to volunteer;
- People are shaping how community wellbeing services are designed and implemented.

3.11 It is proposed that implementation would be driven through a cross-directorate working group overseen via a joint programme board.

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

4.1 The Living Well strategy seeks to reduce health inequalities and improve quality of life and wellbeing across communities in the County, ensuring that those who need it the most have access to community-based support. Working to support good wellbeing outcomes for people is central objective, particularly those with protected characteristics including age and disability.

4.2 The strategy is fundamentally aligned to the Wellbeing of Future Generations Act through promoting a stronger long-term focus on prevention, early intervention, collaboration, and community involvement. The strategy actively seeks to ensure that people have the opportunity to fulfil their potential, no matter what their background or circumstance. The strategy seeks to ensure that the council establishes and reinforces collaborative ways of working that will promote people's physical and mental well-being, and over the long-term will help build communities that are resilient and well-connected.

5. OPTIONS APPRAISAL

	Benefits	Dis-benefits
Adopt a whole authority preventative strategy. RECOMMENDED	Adopting a strategy will provide a coherent approach to addressing inequalities and supporting positive wellbeing outcomes across communities. The strategy will support people to live well and independently for longer, reducing or delaying the need for more intensive services.	Adopting a strategy will have a resource implication in respect of workforce time. Service and practice models may need to be realigned.

	<p>The strategy will offer the council a framework to communicate with residents and partners about promoting positive wellbeing in Monmouthshire.</p> <p>The strategy will support the delivery of the Community & Corporate plan and take the council forward in becoming a resident-centred organisation.</p>	
<p>Do not adopt a whole council strategy</p> <p>NOT RECOMMENDED</p>	<p>Not adopting a policy would mean that business carries on as usual, minimising any impact on existing services.</p> <p>Services / resources would not be required to realign or adapt in order to meet the objectives of the strategy.</p> <p>Cross-directorate working and implementing governance / oversight arrangements can present challenges and take time. These challenges would be avoided through maintaining a business as usual approach.</p>	<p>Problems are not addressed and there is less opportunity to intervene in a coordinated way to address inequalities in health and wellbeing outcomes.</p> <p>Given the wider regional and national policy context, Monmouthshire's unique perspective and contribution to this area of work would risk getting lost.</p> <p>Opportunity to maximise resources, including existing or new grants, might be lost.</p>

6. EVALUATION CRITERIA

6.1 The development of a transparent performance and evaluation framework has been identified as a key workstream. The framework needs to balance ambition and realism and contain clearly articulated objectives. The lived experience of people will be central alongside a range of different measures and milestones to help track whether planned actions are being implemented. Measures will include qualitative and quantitative population indicators incorporating the use of social stories. Where possible measures will align to existing performance evaluations.

7. REASONS:

7.1 .The Living Well strategy has been developed in response to a number of people and organisational drivers. Monmouthshire faces significant health and social challenges driven by an aging population, health inequalities, and socio-economic disparities. There is an aging population – more than a third of our residents are aged over 65 and this proportion is predicted to increase significantly in the coming years.

7.2 Life expectancy and healthy life expectancy in Monmouthshire is higher than the average in Wales, however, people living in more deprived areas have a shorter healthy life expectancy and experience the negative effects of aging sooner compared to those in the least deprived areas.

7.3 From a service perspective, the changes in population needs are resulting in greater numbers of people needing formal care and support. The increasing complexity of people's needs requires higher-cost support placing increased cost pressure on council budgets. These pressures are not solely felt by social services, but occur also within a range of other support areas such as housing and homelessness, community safety, debt advice and public protection.

7.4 With money tied up in acute provision, it is challenging to use the resources for preventative work. There is a pressing need to find new ways of working to address these service pressures and help increase financial sustainability across the Council. The strategy represents an opportunity to address these challenges proactively by working in partnership to tackle the underlying issues affecting people's health and wellbeing, and through the provision of effective, coordinated and targeted community based-support.

8. RESOURCE IMPLICATIONS:

8.1 The cost of the implementing the Living Well Strategy has not been assessed yet. This is not considered to be an inhibitor at this point, as some early activity can be delivered within existing resources. As the programme develops, we will identify needs for additional funds or the potential for reallocation of existing resources.

8.2 There are some initial steps that could be undertaken to better understand and mitigate the financial risks and issues associated with the strategy, as well as a number of mechanisms which could be utilised to secure future additional resources. These are detailed within the draft strategy and include: -a more streamlined approach to grant utilisation; realignment of current resources; increased understanding of returns on investment to support the development of viable business cases and joint bids for additional grants.

9. CONSULTEES:

Members Seminar, June 2025

Cabinet Member for Social Care, Safeguarding and Accessible Health Services

Cabinet Member for Equalities & Engagement

Cabinet Members

Senior Leadership Team

The draft strategy was presented to People Scrutiny on 30th September 2025. Several points were discussed including the approach to implementation regarding community assets and facilities; collaborative engagement with communities and individuals and engagement with partners. A question was raised about why the strategy does not incorporate children given that working preventatively to reduce inequalities and improve outcomes needs to start early. The report has been updated at 3.6 and 3.7 to provide the context and reasons behind the choice to focus initially on adults. A discussion ensued regarding the important role of Town and Community Councils in promoting positive wellbeing and social connection for vulnerable adults. The implementation plan (under partnerships) has been amended to reflect this.

10. BACKGROUND PAPERS:

Appendix 1 draft strategy

Appendix 2 initial implementation plan

11. AUTHOR:

Jane Rodgers

Strategic Director

janerodgers@monmouthshire.gov.uk

Is my report exempt?

In some instances it may be necessary to submit a report to a committee but withhold the whole report, or part of that report, due to the sensitive nature of information contained within it.

There are specific circumstances in which a report may be considered exempt which are set in legislation. When writing your report bear in mind the following circumstances to consider whether your report should be exempt;

Local Government Act, Schedule 12A, Part 4;

12. Information relating to a particular individual
13. Information which is likely to reveal the identity of an individual
14. Information relating to the financial or business affairs of any particular person (including the authority holding that information)
15. Information relating to any consultation or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office holders under, the authority.
16. Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings
17. Information which reveals that the authority proposes –
 - a. To give under any enactment a notice under or by virtue of which requirements are imposed on a person; or
 - b. To make an order or direction under any enactment
18. Information relating to any action taken or to be taken in connection with the prevention, investigation or prosecution of crime.

If you are unsure if the report should be exempt or not you should contact Democratic Services or the Monitoring Officer for further advice and guidance. The principal to bear in mind however is that the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

If your report is to be exempt you should let Democratic Services know as soon as possible if you have not already done so when adding the item to the forward plan of the relevant committee.

When submitting your report to Democratic Services for publication with the agenda you must also include an exemption certificate which give details as to why the report is exempt and not for publication. This certificate will be publicly available with the agenda in place of the report so the reasoning for the exemption should be made clear on this form. The exemption certificate is available overleaf.

Further information on definitions and exemptions is available within the Local Government Act at the following link; <http://www.legislation.gov.uk/ukpga/1972/70/schedule/12A>

SCHEDULE 12A LOCAL GOVERNMENT ACT 1972 EXEMPTION FROM DISCLOSURE OF DOCUMENTS

Meeting and Date of Meeting: [Insert date and meeting](#)

Report: [Insert report title](#)

Author: [Insert author](#)

I have considered grounds for exemption of information contained in the background paper for the report referred to above and make the following recommendation to the Proper Officer:-

Exemptions applying to the report:

[\[Enter the section and reason of the exemption, as defined by the Local Government Act set out above e.g – This report will be exempt under paragraph 12 of Schedule 12A – Information relating to a particular individual\]](#)

Factors in favour of disclosure:

Openness & transparency in matters concerned with the public

Prejudice which would result if the information were disclosed:

[\[Give a brief indication of what information would be disclosed and the impact of its disclosure\]](#)

My view on the public interest test is as follows:

Factors in favour of disclosure are outweighed by those against.

Recommended decision on exemption from disclosure:

Maintain exemption from publication in relation to report

Date: [Insert date](#)

Signed: [Signed by report author](#)

Post: [Insert post](#)

I accept/I do not accept the recommendation made above

Signed: [\[Signed by Chief Officer / Head of Service / Chief Executive\]](#)

Date: [Insert Date](#)

Living Well Monmouthshire

A Preventative Strategy for Resilient, Healthier Communities

This strategy is a key component for delivering the overarching purpose of MCC's Community & Corporate Plan: **"We want Monmouthshire to be a zero-carbon county supporting well-being, health and dignity for everyone at every stage of life"** and two of the Plan's objectives:

A Fair Place, where the effects of inequality and poverty have been reduced

- People are supported when they need help and are given the opportunity to build their resilience as individuals, families and communities
- Citizens work with the Council and their own communities, helping them to take action and shape their futures

A Connected Place, where people feel part of a community and valued

- High quality social care and community-based support which enables and empowers people to live their lives on their terms
- Healthy and sustainable places and communities, where health inequalities that exist within and between communities have been reduced

Aim

Recognising the growing gap between life expectancy and healthy life expectancy, and the impact that this has on individuals, families and council services, our aim is that:

Residents, especially our more vulnerable and 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.

Objectives

A - Healthier Lifestyles

Residents (especially those most at risk of ill-health) increase their physical, mental and social activity, maintain a healthy diet and avoid harmful habits

B - Individual Resilience

Residents (especially those experiencing loneliness and isolation) build connections in their local communities, through which they can access support when needed

C - Community Resilience

Communities (especially in our more disadvantaged areas) have a diverse network of active and inclusive clubs, societies and associations that help reduce loneliness and isolation, and enable people to look out for and support each other

Approach

There are three interdependent strategic pillars: **Alignment, Targeting, Collaboration**

1. Alignment

- 1.1. We will take a **whole-authority approach** to wellbeing and prevention. with close cross-departmental collaboration and working to a shared understanding of definitions, goals and practice models.
- 1.2. This will require a clear **governance/management framework** that is decisive, can reallocate resources when required and supports innovative practices.

1.3. **Monitoring indicators and mechanisms** will be developed to support decision making and accountability, with service areas able to report to SLT and Cabinet on their alignment with the objectives of the strategy and any gaps that could be filled.

2. Targeting

2.1. We will **prioritise supporting those who are near to needing statutory support** – individuals at risk and cohorts of residents experiencing levels of deprivation that make them vulnerable to early ill-health.

2.2. This will require us to be **data driven** so that we can identify the vulnerable individuals and cohorts, and to respond in the most appropriate way.

2.3. We will endeavour to strike an **optimum balance** between targeted (cohort and individual) and whole population (universal) approaches.

3. Collaboration

3.1. Recognising that we cannot achieve these objectives on our own, we will build a **partnership of statutory and third sector organisations and businesses** to promote wellbeing and reduce health inequalities in Monmouthshire.

3.2. This will be facilitated by developing clear **messaging and branding** to use internally and externally to build support for our goals and approach.

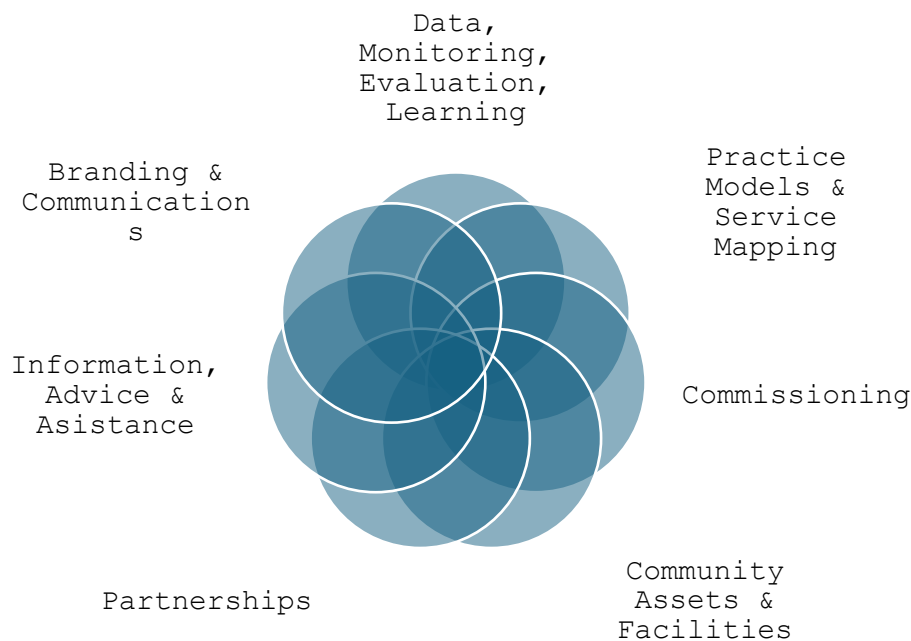
3.3. Wherever possible, we will **coproduce plans** with our target communities.

What success might look like for residents

- Increase in overall healthy life expectancy with a reduction in differences between demographics, so people are enabled to live well and independently, preventing and delaying the need for statutory services for as long as possible
- People are more physically and mentally active, and their overall wellbeing is improved (physical and psychological) with decreased rates of mental ill-health
- People have easy access (through multiple means) to specific information and advice relevant to their health and wellbeing, and more people have access to individualised community-based support to help them improve their long-term wellbeing.
- People have more (social) interactions and more opportunities to volunteer (especially in more deprived areas of the county), so they feel more connected and confident in accessing ad hoc support from their community when needed
- People are shaping how community wellbeing services are designed and implemented, and communities have the wellbeing support they need and have increased resilience as a result

Workstreams and Projects

The strategy will be delivered through several workstreams within and across Directorates, designed to have an immediate to medium term (5 year) impact. Smaller project work sits within the workstreams. The workstreams are inter-dependant, moving forward in correlation rather than sequentially. The intention is for the work to create foundations and mechanisms which will support the evolution of preventative working over time. Activity is designed to have an impact at both a community level and at an individual level. The current workstreams are set out within a separate document.



Whilst the strategy depends on a whole council approach, it is recognised that some service areas will be at the forefront of implementation. These include:- Social Care, Housing, Community Development, Adult Learning, Mon Life, Community Hubs, Place Making.

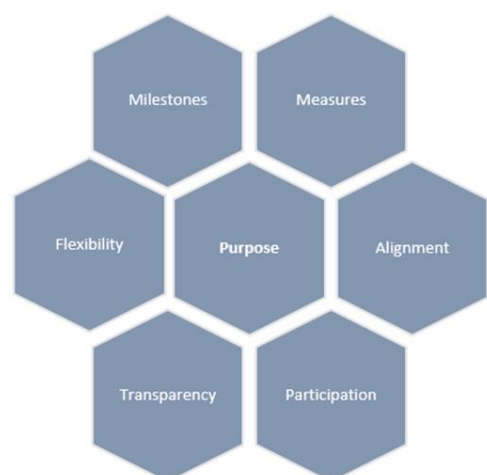
Approach to Monitoring, Learning and Evaluation

Reviewing and evaluating the progress and impact of activity within the workstreams is essential for guiding the strategy, driving accountability, and ultimately achieving positive outcomes—especially in prevention, where the benefits often unfold over time and may be difficult to quantify. We will adopt an iterative approach to learning and flexibility in design so that we can build on success, use windows of opportunity when they arise and adapt where required.

Our approach will use milestones and a range of different measures to assess impact. A preventive approach is best captured by the lived experience of people: those whose lives are improved, risks reduced, and communities strengthened. This will be placed at the heart of the evaluation while balancing ambition, realism, and transparency.

Our approach to evaluation will be built on several foundational principles:

- Clarity of **Purpose**: Articulating aims in terms of human experience and wellbeing
- **Milestones**: To help track whether planned actions are being implemented. These provide a bridge between activity and outcome: even if population-level measures take longer to shift, milestones evaluate progress towards them.
- Meaningful **Measures**: Selecting population indicators (those most representative of the outcome of the aim) and programme indicators (both qualitative and quantitative that can be reliably collected and monitored by a project being implemented). Some measures, such as healthy life expectancy, are influenced by a constellation of societal, economic, and environmental factors. These will be tracked because progress signals broader movement toward the aims of the strategy.



- **Alignment:** Utilising and aligning to existing performance evaluations, including milestones and measures set in the Council's Community & Corporate Plan.
- **Participation:** Involving individuals, families, and communities in telling their story and using their voices, feelings, and relationships to inform evaluations of progress. This will require development in approaches to capturing lived experience.
- **Transparency:** Sharing results and insights openly to build trust and accountability.
- **Flexibility:** Adapting measures and methods as contexts and evidence evolve.

Transparency, adaptability, and stakeholder involvement are keys to making evaluation a driver of change. As the strategy matures, the framework itself should evolve, reflecting new insights and ensuring that the aims of the strategy are achieved.

Governance

Implementation of the strategy will depend on a whole council approach cross-cutting numerous teams and service areas. It will require a strong and committed governance approach to drive the implementation of the strategy; support buy-in, accountability and increase opportunities for critical thinking.

The proposed governance structure

A **Programme Board** will receive update reports from the steering group including review of milestones and measures. Based on recommendations from the steering group the Board will support the development of next steps regarding workstream activities and provide oversight as to when more formal decision making might be required. The Board will be accountable to the Leader / Cabinet.

- Cabinet Member for Social Care, Safeguarding and Accessible Health Services
- Cabinet Member for Equalities & Engagement
- Cabinet Member for Rural Affairs, Housing & Tourism
- Chief Officer, Health & Social Care
- Chief Executive
- Director for Public Health, ABuHB
- 3rd Sector Representative.

A **Steering Group** will report to the Programme Board and will comprise of the workstream leads plus other key individuals relevant to the activities in progress. The steering group will shape the implementation of the work as it evolves, whilst ensuring that established milestones are met. The group will be multi-disciplinary and will include partnership representation. It is critical that within this group the interdependency of the workstreams is understood and that learning results in shared decision making and impactful action.

Current membership:

- Chief Officer, Social Care
- Head of Customer, Communication and Engagement
- Integrated Wellbeing Network Lead
- Wellbeing Early Intervention & Prevention Lead
- Head of Housing Services
- Strategic Partnerships Lead
- Performance & Data Insight Manager
- Leisure Services Manager
- ABuHB Public Health lead for Monmouthshire

For additional oversight, progress against the strategy will be reporting annually into the [People Scrutiny committee](#).

Approach to Engagement and Participation

Engaging with others is central to promoting the aims of the Living Well strategy. Seeking to promote healthier, happier lifestyles, promoting access to wellbeing support for all and enabling independence for longer are aims that by their very nature can only be achieved through partnership and collaboration. A consistent approach to communications both internally and externally will be critical.

For the purposes of implementing the strategy, engagement is understood to be a process and not an event. Within each workstream, there is a clear expectation to facilitate and promote the active involvement of others. This will look differently depending on the workstream or the nature of the activity. An iterative stakeholder analysis will be undertaken to support this, and specific projects will agree the level and type of engagement activity that would be the most relevant and appropriate to the task at hand with reference to the 'ladder of engagement'.

The 'Ladder of Engagement and Participation'

There are many different ways in which people might participate in health depending upon their personal circumstances and interest. The 'Ladder of Engagement and Participation' is a widely recognised model for understanding different forms and degrees of patient and public involvement, (based on the work of Sherry Arnstein⁷). Patient and public voice activity on every step of the ladder is valuable, although participation becomes more meaningful at the top of the ladder.

Devolving	Placing decision-making in the hands of the community and individuals. For example, Personal Health Budgets or a community development approach.	Devolving
Collaborating	Working in partnership with communities and patients in each aspect of the decision, including the development of alternatives and the identification of the preferred solution.	Collaborating
Involving	Working directly with communities and patients to ensure that concerns and aspirations are consistently understood and considered. For example, partnership boards, reference groups and service users participating in policy groups.	Involving
Consulting	Obtaining community and individual feedback on analysis, alternatives and / or decisions. For example, surveys, door knocking, citizens' panels and focus groups.	Consulting
Informing	Providing communities and individuals with balanced and objective information to assist them in understanding problems, alternatives, opportunities, solutions. For example, websites, newsletters and press releases.	Informing

Alongside of our health colleagues key stakeholders include:

- All council colleagues
- People with lived experience and volunteers
- Town and Community Councils
- Interest Groups (e.g. Age Friendly Community)
- 3rd and Voluntary organisations and housing associations
- Future Generations Office
- Gwent and other Local Authorities
- Relevant universities and centres of research

Finance & Resources

The cost of the implementing the Living Well Strategy has not been assessed yet. This is not considered to be an inhibitor at this point, as some early activity can be delivered within existing resources. As the programme develops, we will identify needs for additional funds or the potential for reallocation of existing resources.

There are some initial steps that could be undertaken to better understand and mitigate the financial risks and issues associated with the strategy, as well as a number of mechanisms which could be utilised to secure the additional resources required. These are listed below.

- At present wellbeing support and services depend heavily on the use of insecure short-term grants dispersed throughout the council with different terms and conditions. This strategy presents an opportunity to align grant usage more centrally in order to avoid duplication and support shared wellbeing objectives using the framework and governance of the Living Well Strategy.
- Internal service mapping and development will help ensure that current resources are aligned to the policy intent wherever possible. Equally, a consolidated outcomes-based commissioning plan, aligned to population needs, will ensure maximum value for money against the strategy's aims.
- Transferring money from costly acute services to upstream preventative services is hard to achieve but remains a long-standing ambition for the Council. Projects and activity within the Living Well workstreams must be reviewed / evaluated from a 'return on investment' perspective to support the evidence base and the development of business cases for increased resource.
- Preventative wellbeing and reducing the determinants of health outcomes is a national policy objective presenting opportunities to apply for grants which can support innovation and project work associated with the strategy. Using the strategy to establish shared objectives with 3rd sector organisations and health has the potential to bring in additional resources.

Undertaking these initial steps should underpin the development of a consolidated financial strategy which will in turn support longer-term change. In terms of human resource, the work so far has benefited from time taken from people's existing roles. The implementation of the strategy would benefit from some dedicated project support.

Appendix 1: Definitions

We all want to live in the place we call home, with the people and things we love, in communities where we look out for each other, doing the things that matter to us.

1. Well-being

Well-being is more than being healthy. It is about being safe and happy, having choice and getting the right support, being part of a strong community, having friends and positive relationships, hobbies, work or learning. The elements of well-being (as defined by the SSWB(W) Act are shown in the image. While all elements have equal importance, it is likely that some will be more relevant to one person than another.

Social Services and Well-Being (Wales) Act 2014

Definition of well-being for adults

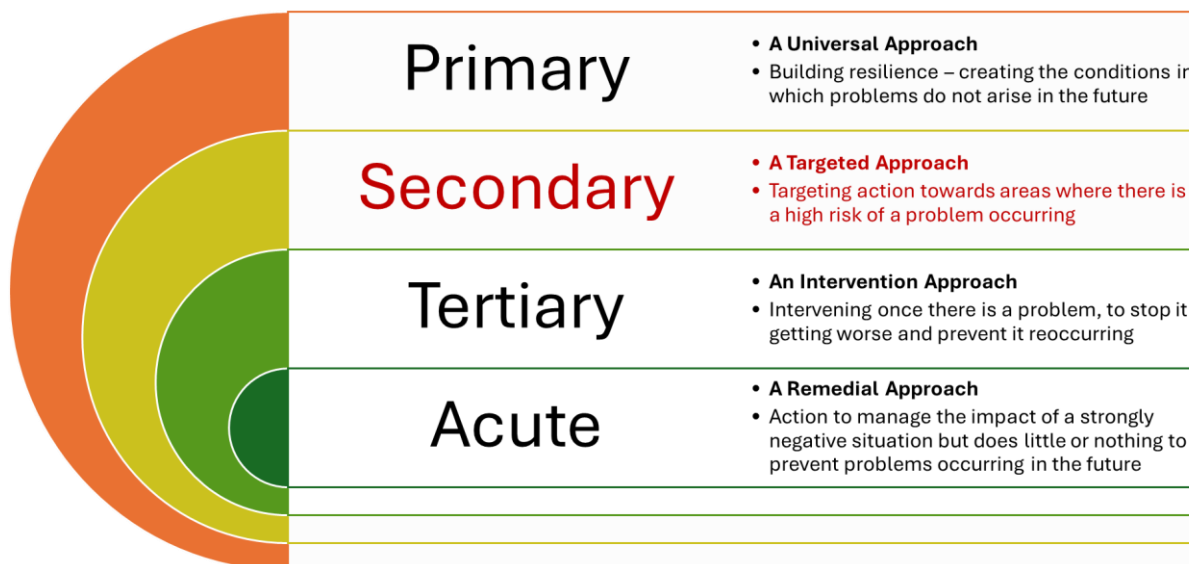


2. Prevention

Early Intervention and Prevention is ensuring access to support to prevent situations from getting worse, and to enhance the maintenance of individual and collective well-being. Centres on increasing preventative services within communities to minimise the escalation of critical need.

Social Services and Well-Being (Wales) Act 2014

Prevention is working in partnership to co-produce the best outcomes possible, utilising the strengths and assets that people and places have to contribute. Breaking down into four levels, each level can reduce demand for the next:



Future Generations Commission

Appendix 2: Drivers & Evidence Base

Population needs

Monmouthshire faces significant public health and social challenges driven by an aging population, health inequalities, and socio-economic disparities.

Monmouthshire has an **aging population** – more than a third of our residents are aged over 65 and this proportion is predicted to increase significantly in the coming years.

Life Expectancy and Healthy Life Expectancy in Monmouthshire is higher than the average in Wales, with life expectancy 84 years for females (66 years healthy life expectancy) and 80 years for males (66 years healthy life expectancy). Monmouthshire does experience levels of **inequality**, with people living in more deprived areas having a shorter healthy life expectancy and experiencing the negative effects of aging sooner compared to those in the least deprived areas.

Driving this well-being crisis are a combination of:

- **Lifestyle** factors- insufficient physical mental and social activity combined with poor diet, smoking and alcohol consumption

There are significant differences in life expectancy within the county. Physical inactivity, poor diet, smoking, and alcohol consumption contribute to health disparities. In Monmouthshire nearly sixty percent of adults report meeting physical activity guidelines a week, just over half of adult residents are overweight or obese, around fifteen percent of adults are current smokers and around a quarter of adults reporting drinking above the guidelines for alcohol a week.

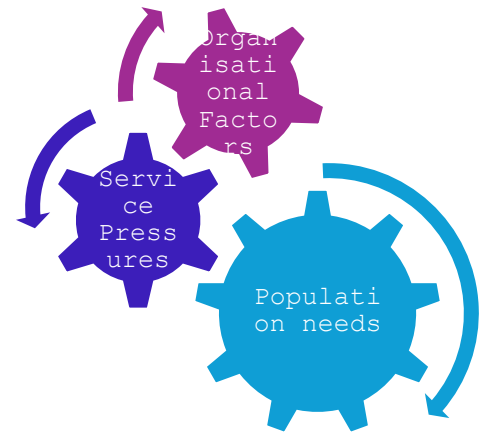
Mental Health plays an important role in well-being. Nearly one in ten adults in the county report having mental health conditions. The rate of loneliness in the county is around fifteen percent of people, loneliness can have a detrimental effect on mental and physical well-being. Monmouthshire is also projected to see a significant increase in dementia cases in the next ten years.

- **Environmental** factors – inadequate housing, poor air quality, limited access to green spaces etc

Monmouthshire has an older, less energy efficient housing stock than many parts of the country. This contributes to fuel poverty, particularly in rural areas where some properties might lack central heating, that can impact the health of residents. Air quality, particularly in Management Areas, poses health risks. Access to green spaces in the County varies by area, especially in more deprived communities, limited access can reduce the benefits utilising green space can have on well-being.

- **Infrastructure** factors – limited or no public transport, uneven access to community spaces, etc

The nature of the rural county in Monmouthshire makes it harder for some people to access basic services, such as transport and health provision. Infrequent public transport can mean longer travel times for access to employment and local services and results in an over-reliance on cars which not everyone has access to. Public and private return travel times to services such as doctors' surgeries, libraries or leisure centres in Monmouthshire are also generally higher than other areas in Wales. For example, some communities are ranked among the most deprived in Wales for access to services. This poses further challenges, particularly combined with limited public transport, for elderly residents.



House prices in Monmouthshire are amongst the highest in Wales. This is compounded by the limited availability of private rental properties and rising monthly rents. 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.

- **Economic** factors – lack of financial resilience and increases in cost of living puts additional strain on individual and family life

In Monmouthshire, households in genuine poverty often live close by others who are extremely affluent. Research shows that this relative income inequality is associated with worse outcomes in things as diverse as health, crime levels and social cohesion. Poverty affects different groups in different ways. Women are more likely to be in low-paid jobs, with fewer savings than men and therefore at an increased risk of poverty. Households in which someone is disabled are also at higher risk of being in relative income poverty.

More people are at risk of falling into poverty with the continued high costs of living. People are having to spend a higher proportion of their income on essentials such as food and energy. Around one in ten households in Monmouthshire are living in material deprivation and income levels vary significantly in some parts of the county.

The ratio of house prices to workplace-based earnings makes property ownership unaffordable for some. This can particularly make it difficult for young people to live and work locally, leading to outward migration and potential impacts on community viability and health.

All of these factors can impact an individual's well-being and increase pressures across services.

Service pressures

These changes in population needs result in **greater numbers of people needing care**, with more of them having **complex needs that require higher-cost support**. Combined with increasing costs of providing care at home and residential placements, this is placing increased cost pressure on council budgets and the council tax residents pay.

These population needs are also resulting in an increasing number of individuals and families requiring **additional public service support** from services such as housing support, homelessness, Mental health, health, community safety, debt advice and support services.

With money tied up in statutory provision, it is challenging to preserve or enhance spending into the preventative space. There is a pressing need to find new ways of working to address these service pressures and put social care support onto a more sustainable footing.

Organisational factors

The Council's **Community and Corporate Plan** has a clear commitment to tackling inequality and promoting wellbeing.

The Council 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. The Council is committed to working with partners across Gwent as part of the Public Services Board (PSB) and the Institute of Health Equity to tackle these by becoming what is known as a **Marmot Region**.

While many parts of the council support the wellbeing of residents, there isn't a common understanding of **targeted** prevention, or a shared commitment to how we address health inequalities.

The planning and budgeting of preventative approaches is further hindered by the challenges of measuring the effectiveness of preventative work and its impact on residents and services.

Third sector organisations face challenges on their sustainability.

Legislation & Policy Drivers

The **Social Services & Well-being** (Wales) Act (2014) imposes duties on local authorities, health boards and Welsh Ministers that require them to work to promote the well-being of those who need care and support, or carers who need support. One of the principles of the act is services will promote the prevention of escalating need and the right help is available at the right time.

The **Well-being of Future Generations** (Wales) Act is about improving the social, economic, environmental and cultural well-being of Wales. The Act places a duty on public bodies to act in accordance with the sustainable development principle meaning that the body must act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs. To achieve this are five ways of working that public bodies need to think about to apply the principle, one of which is prevention - how acting to prevent problems occurring or getting worse may help public bodies meet their objectives. In the **Future Generations report 2025** the Future Generation Commissioner for Wales made a recommendation related to Health & well-being that public bodies should include prevention as a core strategic objective in corporate strategies and planning.

The Council's **Community & Corporate Plan** 2022-2028 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, including a Connected place where people feel part of a community and are valued.

Building a Fairer Gwent: Improving Health Equity and the Social Determinants is a report drawn up in partnership between **Gwent Public Services Board** (PSB) and the Institute of Health Equity that aims to narrow the health divide across the region. The Gwent PSB has adopted the eight principles set out in the Building a Fairer Gwent report as the framework for action to reduce inequalities as part of its Well-being Plan. The Gwent PSB, have formally agreed to work in partnership to use this approach as the basis for the response to improve well-being and reduce health inequalities.

SUBJECT: Connect To Work Supported Employment Programme
MEETING: Cabinet
DATE: 17/10/2025
DIVISION/WARDS AFFECTED: ALL

PURPOSE:

- 1.1 To inform Cabinet of the Connect to Work programme and proposed Lead Local Authority – Cardiff City Council to act as the accountable body to manage and administer the grant from the Department of Work and Pensions (DWP).

2 RECOMMENDATIONS:

That Cabinet:

- 2.1 Agrees that Cardiff City Council (CCC) acts as the Lead Local Authority for the Connect to Work programme for the ten Local Authorities across the Southeast Wales region.
- 2.2 Agrees that the preferred option for delivery is in house by the Economy, Employment & Skills team as detailed in this report.

3 KEY ISSUES:

- 3.1 One of the UK Government's five missions is to kickstart economic growth with good jobs and improved productivity in every part of the country. The ambition is for a more inclusive economy which enables people to get into work and to get on at work, ensuring employment opportunity for all. The Government aims to take a more collaborative, locally led approach to tackling 'Hidden Unemployment', to support local people to realise their potential through local and national growth. The new Get Britain Working Strategy will bring fundamental reform that transforms our relationship with local areas and ensures we have a strong foundation with which to work in partnership to support people into good, sustainable work. The Connect to Work programme being one of the first major elements of the Get Britain Working Strategy.
- 3.2 In order for the delivery of the Connect to Work Programme to commence in Southeast Wales, the approval of a Local Authority to act as the Lead Accountable Body to administer the programme in accordance with Department of Work & Pensions governance requirements.
- 3.3 Connect to Work is a Supported Employment programme aimed at supporting individuals with health barriers (Individual Placement Support – IPS) and disabilities (Supported Employment Quality Framework – SEQF) into meaningful paid employment from April 2025- March 2030.

- 3.4 In Monmouthshire, as of July 2025, 3986 UC Claimants (Appendix 1) were in the “No Work requirements” bracket, however, this doesn’t necessarily mean they do not want to seek employment, just that their claimant commitment doesn’t require them to do so. It is likely, the majority of Connect to Work enrolments will come from this cohort, with the target set by DWP within Monmouthshire, is to enrol 272 participants on to the programme, supporting a minimum of 136 participants into paid employment from April 2025 - March 2030.

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

- 4.1 The Equality and Future Generations Evaluation Assessment detailed in Appendix 2, has identified that overall, the delivery of the Connect to Work Programme has positive benefits. Negative implications, however, have been identified.
- 4.2 The negative implications identified are based on the strict enrolment criteria of the programme which has been designed by Department of Work and Pensions. All potential participants requiring support will need to be vetted by DWP beforehand to ensure the individual is eligible, this could prevent or delay an individual gaining access to the support.

5. OPTIONS APPRAISAL

5.1 Delivery of Connect to Work Programme in Monmouthshire

Option	Benefit	Risk
In-House (preferred)	<p>Established team that have delivered programmes to Monmouthshire residents since 2016 supporting individuals into employment.</p> <p>An understanding of the local labour market and links with employers.</p> <p>A successful project delivered for Economically Inactive claimants under Shared Prosperity Fund that can be built on through Connect to Work..</p> <p>A good working relationship with DWP.</p> <p>Not a payment by results programme.</p>	<p>The Supported Employment model is new to the team, therefore time to embed this new model may impact on KPI's.</p> <p>Non-existent working relationships with health board (local and across the region) – who DWP have identified as key to engagements under the IPS strand.</p>
Commission	<p>May be more experienced delivering IPS and SEQF supported employment models.</p> <p>May be more established with working alongside Health Board through other programmes delivered.</p>	<p>May not have local knowledge and relationships with key partners.</p> <p>Balancing contract with other commitments in other areas of the United Kingdom.</p> <p>Difficult to operate a programme rurally with little/no infrastructure.</p> <p>The pre-determined financial profiling may inhibit the commissioning work for delivery in only Year 3 and 4 of the programme.</p> <p>Programme delivery, likely to be delayed beyond Year 1, commissioning work delays that further.</p>
Mixed	<p>If one element was commissioned out, it would allow a sole focus for each delivery partner.</p>	<p>Difficult to split the commissioning element up. If SEQF (20% of programme delivery to be commissioned) this would equate to £180,000 over a four-year period to cover all elements of delivery.</p>

6. Reasons

Connect to Work Programme

- 6.1 In-house delivery is the preferred mechanism of delivery for both the IPS (Health related/economically inactive) and SEQF (Disabilities) supported employment delivery models.
- 6.2 Due to the financial profiling scaling up, the in-house approach will focus on delivering IPS Supported Employment, which accounts for 80% of the enrolled programme participants. This will give us additional time to explore how best we can roll-out delivery for the 20% SEQF programme participants from Year 3 onwards working in partnership with identified departments internally.
- 6.3 Under Supportive Employment model, there is strict quality assurance demands, being a Qualification Centre with three awarding bodies, we are experienced in meeting quality assurance requirements.
- 6.4 Sitting alongside additional grant funded employability programmes, the Connect to Work programme will be able to benefit from functions that sit within those and will be managed by the Adult Employment & Skills Lead.

7. Financial Implications

- 7.1 The Southeast Wales region will receive £34,000,000 to deliver the programme over the five-year period, of which Monmouthshire will receive 3% which is £1,013,428.57.
- 7.2 The Connect to Work programme will scale up over the coming five years, the table below sets out Monmouthshire's allocation (pre management fees).

Funding	25/26	26/27	27/28	28/29	29/30	TOTALS
<i>Monmouthshire</i>	£65,428.57	£148,857.14	£343,714.29	£331,428.57	£124,000.00	£1,013,428.57

- 7.3 Cardiff City Council acting as the Accountable Body will request somewhere between 8-10% of the allocation for management fees.
- 7.4 There are no financial implications that the local authority will incur during the delivery of the programme. The posts within the Connect to Work Programme will be funded 100% by the grant. the management and administrative elements will be met through existing Economy, Employment & Skills structures.
- 7.5 Risk of redundancy costs being incurred should programme end in 2030 can be absorbed by the programme as an allowable cost.

8. CONSULTEES

Senior Leadership Team;
Deputy Leader and Cabinet Member for Planning and Economic Development Cllr Griffiths
Chief Officer for Children, Learning, Economy & Skills
DMT Children, Learning, Economy & Skills
Head of Economy, Employment & Skills
Department of Work & Pensions
Cardiff City Council Connect to Work Administrative Team

9 AUTHOR

Rory Clifford

Adult Employment & Skills Lead

10. CONTACT DETAILS

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roryclifford@monmouthshire.gov.uk

Appendix 1) Overall figures of UC Claimants – July 2025

Source: StatXplore via DWP

Month	Jul-25						
Conditionality Regime	Searching for work	Working - with requirements	No work requirements	Working - no requirements	Planning for work	Preparing for work	Total
Vale of Glamorgan / Bro Morgannwg	2,304	1,614	7,546	2,161	143	770	14,540
Cardiff / Caerdydd	9,587	5,978	24,528	6,280	627	2,482	49,483
Merthyr Tydfil / Merthyr Tudful	1,134	949	5,658	1,257	98	492	9,595
Caerphilly / Caerffili	3,452	2,293	15,023	3,551	269	1,392	25,979
Blaenau Gwent / Blaenau Gwent	1,563	1,138	6,906	1,536	146	682	11,978
Torfaen / Tor-faen	1,933	1,468	7,784	2,186	196	775	14,350
Monmouthshire / Sir Fynwy	1,181	915	3,986	1,378	81	392	7,934
Newport / Casnewydd	4,388	2,708	11,812	3,373	367	1,239	23,884
Total	25,543	17,064	83,249	21,723	1,935	8,229	157,745



monmouthshire
sir fynwy

Integrated Impact Assessment (incorporating Equalities, Socio-economic Duty, Future Generations, Welsh Language Measures, Corporate Parenting)

Name of the Officer Rory Clifford Phone no: 01600 750350 E-mail: roryclifford@monmouthshire.gov.uk	Please give a brief description of the aims of the proposal To agree on the delivery model of the Connect to Work Programme and the Accountable Body to administer the programme.
Name of Service area Economy, Employment & Skills	Date 30 th September 2025

Are your proposals going to affect any people or groups of people with protected characteristics? Please explain the impact, the evidence you have used and any action you are taking below.

<u>Protected Characteristics</u>	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age <i>Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.</i>	The programme will support Monmouthshire residents aged 16+. The age criteria has been determined by the Department of Work & Pensions.	None identified	N/A

<u>Protected Characteristics</u>	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability <i>Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.</i>	<p>The programme has been designed by the Department of Work & Pensions to support individuals with disabilities into employment. Individuals on the programme will have a disability as defined in section 6 of the Equality Act 2010 or the Social Model of Disability.</p>	<p>As per DWP requirements, therefore out of control:</p> <ul style="list-style-type: none"> • They must not currently be doing any paid work and would be available to start a suitable job (applies only to participants who are not working), or are at risk of losing work (retention participants only). • Should have been employed continually for at least 3 months before starting Connect to Work, (retention participants only)*. • Are of Working Age, aged 16 or more in Wales. • Have the right to work in the United Kingdom. • Have the right to live in the United Kingdom and are resident in England or Wales. • Do not belong to a group which has no entitlement to public funds. • Is not on a DWP employment programme 	<p>Ensure criteria is followed and seek support from the accountable body if unsure.</p>
Gender reassignment <i>Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.</i>	<p>We aim to provide a provision which is inclusive for transgender people and groups. We will address any issues in regards to work placements, employment and training opportunities.</p>	<p>None identified</p>	<p>N/A</p>

<u>Protected Characteristics</u>	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Marriage or civil partnership <i>Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.</i>	N/A	None identified	N/A
Pregnancy or maternity <i>A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.</i>	Risk assessment will be in place for pregnant participants ensuring all health and safety measures have been addressed and the well-being of the person is paramount.	None identified	N/A

<u>Protected Characteristics</u>	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Race <i>What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.</i>	People referred onto our programmes will be given the same opportunities regardless of race. The relevant support will be provided to meet individual needs	None identified	N/A
Religion or Belief <i>Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.</i>	People referred onto our programmes will be given the same opportunities regardless of religion or belief. The relevant support will be provided to meet individual needs	None identified	N/A
Sex <i>Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.</i>	People referred onto our programmes will be given the same opportunities regardless of their sex. The relevant support will be provided to meet individual needs	None identified	N/A

<u>Protected Characteristics</u>	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sexual Orientation <i>Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.</i>	People referred onto our programmes will be given the same opportunities regardless of their sexual orientation. The relevant support will be provided to meet individual needs	None identified	N/A

2. The Socio-economic Duty

The Socio-economic Duty requires public bodies to have due regard to the need to reduce inequalities of outcome which result from socio-economic disadvantage when taking key decisions.

Socio-economic disadvantage can be defined as living in less favorable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)

Single parents

Vulnerable families

Single adult households

Carers

Students

People living in the most deprived areas

Pensioners

Homeless People

People misusing substances

People who have experienced the asylum system

People involved in the criminal justice system

<u>Socio-economic Duty</u>	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	Describe any negative impacts your proposal has in respect of people suffering from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?

<p><i>Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?</i></p>	<p>As per DWP guidance:</p> <p>Eligible participants must be a disabled person, or belong to one of the specified disadvantaged groups:</p> <p>Have a disability as defined in section 6 of the Equality Act 2010 or the Social Model of Disability.</p> <p>Meet the definition of one of the specified disadvantaged groups with additional multiple and complex barriers that would benefit from support;</p> <p>The specified groups are as follows:</p> <p>An offender (someone who is serving a community service) or ex-offender (someone who has completed a custodial or community sentence).</p> <p>A carer.</p> <p>An ex-carer.</p> <p>A homeless person.</p> <p>A former member of His Majesty's (HM) Armed Forces (AF), a member of HM AF reserves, or a partner of current or former Armed Forces personnel.</p> <p>A person for whom a drug or alcohol dependency, including a history of dependency, presents a significant barrier to employment.</p> <p>Care experienced young person or a care leaver</p> <p>A refugee, a resettled Afghan.</p> <p>A person on the Ukrainian scheme.</p>	<p>No impact identified at this stage</p>	<p>N/A</p>
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	<p>A victim/survivor of domestic abuse.</p> <p>Young people identified as being involved or at risk of being involved in serious violence.</p> <p>A victim of modern slavery.</p> <p>For those eligible and suitable for Connect to Work support, they will receive extensive supported employment to better their chances of entering the workforce.</p> <p>The primary focus for the programme will be individuals who are not required to seek work as a condition of benefit receipt (who have often been overlooked for employment support). DWP expect appropriate participants to have never worked or to have not worked for around 6 months or more.</p>		
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3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards :	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
<p>Policy Making:</p> <p><i>Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably than the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.</i></p>	<p>The Department for Work and Pensions has adopted the principle that in the conduct of public business in Wales it will treat the Welsh and English languages on a basis of equality.</p> <p>As a Local Authority team will adhere to the Council's Welsh Language Standards.</p>	No impact identified at this stage	N/A
<p>Operational:</p> <p>Recruitment & Training of workforce</p> <p><i>Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.</i></p>	There is no planned recruitment yet. However, where new posts are required, the need to communicate through Welsh and English as part of the recruitment process and any necessary training offered as needed.	No impact identified at this stage	N/A
<p>Service Delivery:</p>	The programme will be bilingually promoted.	Depending on the Welsh language skills of the delivery staff, it is unknown whether	On a current employability programme, where we monitor Welsh Language, 1.9% have had the ability to speak

Use of Welsh language in service delivery <i>When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.</i>		delivery would be possible in the Welsh language should it be requested.	Welsh and all have been happy to receive support in English, due to the unavailability of a fluent Welsh speaker. If this is not feasible, we will seek support from the Accountable Body/DWP.
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4. Does your proposal deliver any of the well-being goals below? Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!




<u>Well Being Goals</u>	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
6 A prosperous Wales <i>An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.</i>	The programmes ultimate aim is to move those furthest away into employment, removing individuals reliance on benefits, generating individual wealth and ability to become financially independent.	No impact identified at this stage	N/A
A resilient Wales <i>Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).</i>	Programme will use resources effectively to support social and economic resilience of programme participants through providing the Supported Employment Model endorsed by DWP. We will work collaboratively on a regional footprint, to ensure efficiency and	No impact identified at this stage	N/A

<u>Well Being Goals</u>	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	share best practise to overcome obstacles.		
A healthier Wales <i>People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.</i>	The programme will work with economically inactive residents, supporting them into meaningful and sustainable employment by addressing health and wellbeing barriers alongside employer. Building relationships with health care professionals, organisations and networks and other health and wellbeing services.	No impact identified at this stage	N/A
A Wales of cohesive communities <i>Communities are attractive, viable, safe and well connected</i>	<p>This programme will encourage safe and appropriate use of IT and the internet, developing participants digital literacy skills, enabling them to successfully apply for job opportunities and be confident using I.T in the workplace.</p> <p>The programme will link to the wider community, connecting programme participants with other community ventures (such as volunteering) and be active citizens in their community.</p>	No impact identified at this stage	N/A
A globally responsible Wales <i>Taking account of impact on global well-being when considering local</i>	The programme aims to support employers in the employment of participants with barriers. The team	No impact identified at this stage	N/A

<u>Well Being Goals</u>	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<i>social, economic and environmental wellbeing</i>	will help employers understand reasonable adjustments, job carving and access to grants such as Access to Work to support an individual in the workplace, ensuring the participant social and emotional wellbeing is stable to maintain employment and thrive.		
A Wales of vibrant culture and thriving Welsh language <i>Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation</i>	The programme will have marketing, publications and printed literature available bilingually where appropriate. The programme will conform to the Welsh Language Legislation Welsh Language Wales Measure and accompanying Welsh language standards.	No impact identified at this stage	N/A
A more equal Wales <i>People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)</i>	The programme itself is underpinned by equality and equity, enabling residents with significant barriers to employment the opportunity (without rejection) to seek paid employment.	No impact identified at this stage	N/A

5. How has your proposal embedded and prioritised the sustainable governance principles in its development?

<p><u>Sustainable Development Principles</u></p>	<p>Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.</p>	<p>Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?</p>
<div data-bbox="98 263 293 464">  </div> <p data-bbox="129 475 264 507">Long Term</p> <p data-bbox="318 256 595 403">Balancing short term need with long term and planning for the future</p> <p data-bbox="318 438 595 536"><i>We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)</i></p>	<p>As this is a grant-funded programme from the Department of Work & Pensions, we are at the mercy of their timescales and therefore we do not have the ability to look beyond the remit of the programme.</p>	
<div data-bbox="98 722 293 991">  </div> <p data-bbox="112 1007 280 1038">Collaboration</p> <p data-bbox="318 794 595 903">Working together with other partners to deliver objectives</p>	<p>This programme cannot be addressed by one single agency. It will be developed in partnership with the 9 other local authorities within South East Wales and locally across a number of departments internally and organisations externally.</p>	

<p><u>Sustainable Development Principles</u></p>	<p>Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.</p>	<p>Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?</p>
<div data-bbox="107 268 280 454">  </div> <p>Involvement</p> <p>Involving those with an interest and seeking their views</p> <p><i>Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?</i></p>	<p>This programme is grant funded and no changes to the operational delivery of the programme are permitted as per DWP guidance.</p> <p>However, once the programme is signed off and mobilising, the delivery manager and fellow delivery staff will engage with stakeholders such as referral partners and seek support in identifying suitable participants.</p>	
<div data-bbox="107 667 280 853">  </div> <p>Prevention</p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The programme itself will support Monmouthshire residents to move into employment, potentially reducing and preventing reliance on the benefits system.</p>	
<div data-bbox="107 922 280 1109">  </div> <p>Integration</p> <p>Considering impact on all wellbeing goals together and on other bodies</p> <p><i>Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations</i></p>	<p>Programme participants well being is paramount and supporting them to overcome health and wellbeing barriers alongside work related barriers will be a significant factor in participants moving into employment.</p> <p>The support and guidance, linking participants with health care professionals, organisations and networks and other health and wellbeing services will be a crucial element that will enable success.</p>	

6. Council has agreed the need to consider the impact its decisions has on the following important responsibilities: Corporate Parenting, Care Leavers, Care Experienced People and Safeguarding. Are your proposals going to affect any of these responsibilities?

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
<p><u>Safeguarding</u></p> <p><i>Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.</i></p>	<p>Safeguarding is a priority, many participants on our programmes will have multiple barriers and are vulnerable individuals. All Employment & Skills staff have completed Safeguarding level 1. Some staff including the service lead are trained to Level 2 and all staff will maintain the level of which they are trained.</p>		<p>For vulnerable adults on the programme, risk assessments will be carried out prior to support and during the Vocational Profiling phase to pass on any potential risks to future employers.</p>

<p><u>Corporate Parenting, Care Leavers and Care Experienced People</u></p> <p><i>This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.</i></p>	<p>People referred onto the programme will be given the same opportunities regardless of their situation. The relevant support will be provided to meet individual needs.</p>		
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7. What evidence and data has informed the development of your proposal?

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: [Enabling Strategies](#) See Guidance for more examples.

Delivering the programme in house aligns with the Corporate & Community Plan of A Fair Place to Live and A Thriving and Ambitious Place. The programme also feeds into the Economy, Employment & Skills strategy of supporting individuals into sustainable employment.

8. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

The programme will address a number of Wales wellbeing goals on an individual level, with individuals becoming more prosperous through gaining employment and employers becoming globally responsible by supporting individuals with greater barriers. Due to the programme coming direct from DWP, it is not possible to make changes on the intended impacts.

9. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.

What are you going to do?	When are you going to do it?	Who is responsible?

10. VERSION CONTROL: The Integrated Impact Assessment should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision-making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.

Version No.	Decision making stage <i>e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc</i>	Date considered	Brief description of any amendments made following consideration
1	SLT	16 th September 2025	Consideration to challenge Accountable Body on justifying 8-10% management fee

2	Business Cabinet	23 rd September 2025	
3	Cabinet	17 th October	

SUBJECT: 2025/26 REVENUE BUDGET – FINANCIAL UPDATE
MEETING: CABINET
DATE: 15th October 2025
DIVISION/WARDS AFFECTED: ALL

1. PURPOSE:

- 1.1 To provide Cabinet with an update of the progress against the Councils revenue budget for the 2025/26 financial year.

2. RECOMMENDATIONS:

- 3.1 That Cabinet note the forecast revenue budget overspend of £533,000, representing a forecast 0.2% variance against the approved budget for the year.
- 3.2 That Cabinet note the budgetary risks that are inbuilt into this forecast, namely;
- The volatility of demand for high-cost services, particularly in Adults & Children's Social Care;
 - Higher inflation levels currently being experienced than originally budgeted for;
 - The risk of further non-delivery of the £10.7m of budgeted savings targets, with services currently forecasting 92.1% delivery;
 - The trend of reducing debt recovery, particularly within Council tax and Social Care where there has been a slowing down in collection rates, and where there are increasing numbers of discounts and exemptions being awarded;
 - The potential impact upon the Council's financial resilience from the forecast increase in the cumulative schools reserves deficit that is being carried on the Council's balance sheet.
- 3.3 Cabinet notes that confirmation has been received for funding related to the increased cost of Employers' National Insurance Contributions, resulting in a funding shortfall of £811k or 24% compared to the actual cost increases. The Council will use its contingency budget of £850k to address this shortfall, as reflected within this forecast.

- 3.4 That Cabinet note the forecast increase in the deficit on cumulative schools reserves as outlined in **Appendix 4** of this report of £2,835,000. This would result in school balances ending the financial year in a deficit of £6,926,000, with eighteen of thirty-five schools forecast to be in a deficit balance.
- 3.5 That Cabinet note that schools which are budgeting to end the 2025/26 financial year in a deficit balance are required to bring forward recovery plans by October half term to ensure that the proposed actions to address their budget shortfalls are instigated.

4 KEY ISSUES:

4.1 Context

- 4.2 The 2025/26 budget round reflected the sustained period of increased demand, complexity, and costs within School ALN provision, and Adults and Children's social care, which were addressed through significant base budget increases.
- 4.3 The budget set by Council in March also needed to consider other headwinds which continue to impact the Council's service operating environment:
- The wider socio-economic landscape and cost of living challenges that continue to have an impact on our communities, with a consequential increase in demand for Council services, and impact upon income generating services
 - The wider public sector challenges which impact upon Council services, notably within Health where efforts to improve patient pathways impact upon the level and complexity of demand for Social care
 - Headline inflation rates remain above UK Government targets, with some discrete areas of Council services continuing to experience cost pressures on supplies and services alongside supply chain issues
 - In continuing efforts to combat inflation, interest rates have remained higher for longer and above previous UK Government forecasts
- 4.4 The above results in a growing need for supportive Council services, pressure on income generating services, increased risks around debt recovery, and a higher-cost operating environment.

4.5 Revenue budget forecast

- 4.6 Full Council approved a revenue expenditure budget of £236,778,000 for the 2025/26 financial year. The latest forecast against this budget at a directorate level is shown below:

Table 1: Revenue budget forecast by directorate

Directorate	Budget £000's	Forecast £000's	Forecast Overspend / (Underspend) £000's	% Variance to budget
Social Care, Health & Safeguarding	77,982	79,056	1,074	1.4%
Learning, Skills & Economy	72,635	72,675	40	0.1%
Infrastructure	21,462	21,402	(61)	-0.3%
Place & Community Wellbeing	7,632	7,773	141	1.8%
People, Performance & Partnerships	4,655	4,754	99	2.1%
Legal & Governance	3,089	3,153	64	2.1%
Resources	9,216	9,121	(95)	-1.0%
Corporate & Treasury management	40,106	40,564	458	1.1%
Expenditure to be financed	236,778	238,497	1,719	0.7%
Financing	(236,778)	(237,964)	(1,186)	-0.5%
Total	0	533	533	0.2%

- 4.7 Specific cost pressures remain within Social Care despite significant investment as part of the base budget for 2025/26. In Adult services this is driven by the rising demand for high-cost care packages, particularly in placements. While reablement efforts are expanding, they are not yet sufficient to offset the overall need for care. Service and practice changes are beginning to mitigate costs, but further progress is needed.
- 4.8 In children's services, although placement costs remain stable, financial strain has emerged due to the need to sustain family support following the withdrawal of certain Welsh Government grants. Maintaining this support is crucial to prevent increased placement costs and to ensure better outcomes for children.

- 4.9 Both Adults and Children's services are vulnerable to fluctuations in demand, especially as winter approaches. In housing and homelessness, the opening of Severn View offers some immediate cost mitigation, but pressures within private leasing through increased costs and rental debt arrears present ongoing financial challenges that require further mitigation.
- 4.10 Fleet Maintenance is forecasting a £171k overspend, driven by increased fuel costs, hire charges, and EV charger inspection and maintenance. The service is actively monitoring vehicle utilisation to reduce this overspend by year-end.
- 4.11 Passenger transport faces a net overspend of £392k, driven by a £265k shortfall in School transport against the catchment area savings planned for 2025/26. Changes in pupil numbers and route safety have limited the ability to fully realise expected savings. Internal operations are also under strain due to reduced income from contract changes and delays in adjusting vehicle and staffing costs. While grant income has helped offset some of the pressure, further mitigation options are being explored, with more accurate figures expected once September pupil numbers and contracts are confirmed.
- 4.12 Funding for the increased cost of Employers' National Insurance Contributions was not included within the final Welsh Government grant settlement. For the purposes of budget setting, it was assumed that the additional £3.32m pressure relating to the increase in 'direct' employers' national insurance contributions would be fully funded. Confirmation was received in July that Monmouthshire will receive £2.51m of funding, a shortfall of £811k or 24%. The Council set aside a contingency budget of £850k as part of budget setting that will need to be drawn upon to address this shortfall and this is reflected within forecasts. Whilst it has been confirmed that the funding will transfer into the Welsh Government grant base for 2026/27, the recurrent cost pressure will also need to be considered as part of the budget process for 2026/27.
- 4.13 The NJC pay award for 2025/26 was agreed in July at 3.2% which is marginally above the budgeted assumption of 3.1%. The resultant additional cost pressure of £0.1m will need to be met from within existing service budgets, with an increase in base budget pressure considered for 2026/27.
- 4.14 The NJC have agreed that from 1 April 2026, Spinal Column Point (SCP) 2 will be permanently deleted from the NJC pay spine. Whilst this is not expected to result in an immediate cost pressure, it may be necessary to review existing pay band structures given the erosion in the pay differential between bands.
- 4.15 Welsh Government have confirmed a 4% pay award will be implemented for teaching staff from September 2025. Whilst this increase is above the Councils budget assumption of 3.1% increase, Welsh Government have confirmed they will continue with their recent

commitment of providing additional grant funding in-year to meet the increased costs falling to local government. As a result, no budget cost pressure is anticipated.

4.16 Underspends within Waste and Decarbonisation, alongside ongoing staff vacancies across some services, and out-performance of Council tax income targets have all helped mitigate the overspends reported.

4.17 **Appendix 1** to this report outlines the summary reasons for the service budget variances, with a more detailed explanation outlined in **Appendix 2**.

4.18 Budgeted service savings

4.19 As part of the approved revenue budget, services were required to bring forward and deliver savings totalling £10,701,000. The current forecast indicates a projected shortfall of £847,000 (7.9%) in meeting this target.

4.20 Full details of progress against individual savings targets can be found at **Appendix 3** to this report, however the main variances are as follows:

Table 2: Progress against budgeted savings targets

Savings proposals by Directorate	Budgeted Saving	Current Forecast	Variance	Percentage met	Comment
	£000	£000	£000	%	
Social Care, Health & Safeguarding	(2,950)	(2,589)	361	87.8%	£250k Adult's services - Too early in the year to ascertain if the full £250k of savings will be delivered from practice change, given the complexity and level of demand for care presenting. £111k Homelessness – Delay in Severn view opening that impacts on 4 months of savings being generated.
Learning, Skills and Economy	(745)	(745)	0	100%	No variance forecast
Infrastructure	(5,679)	(5,254)	425	92.5%	£265k Passenger Transport routes - Pupil figures have changed, and some routes are unsafe, requiring continued transport.

					£160k Waste funding – the final extended producer responsibility funding has been confirmed as slightly lower than anticipated.
Place & Community Wellbeing	(606)	(606)	0	100%	No variance forecast
People, Performance and Partnerships	(165)	(104)	61	63.0%	Savings anticipated from further structure changes are not deemed achievable following further review. Savings in subscriptions has not been achieved.
Legal & Governance	(1)	(1)	0	100%	No variance forecast
Resources	(555)	(555)	0	100%	No variance forecast
Totals	(10,701)	(9,854)	847	92.1%	

4.21 Schools' budgets and reserves

4.22 The overall level of school reserves are currently forecast to move further into deficit by £2,835,000 by the end of the 2025/26 financial year, to a collective deficit balance of £6,926,000. This forecast draw is £120,000 above the budgets schools have set for the year.

School reserve balances at 31 st March (Surplus) / Deficit	2022 £000	2023 £000	2024 £000	2025 £000	2026 (Forecast) £000
Comprehensive schools	(2,253)	(1,259)	976	1,366	1,973
Middle schools	0	0	329	1,386	1,917
Primary schools	(4,622)	(3,027)	(1,142)	(306)	265
Special schools	(79)	31	742	1,645	2,771
Total	(6,955)	(4,255)	905	4,091	6,926

4.23 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 for both teaching and non-teaching staff have also impacted upon budgets in recent years.

- 4.24 All schools that forecast a deficit balance at a financial year-end are required to bring forward budget recovery plans. Close monitoring and support continues to be given to these schools, as well as those at risk of entering a deficit position over the medium term, to ensure that the proposed actions to address medium term budget challenges are instigated.

4.25 **Financial implications and future focus**

- 4.26 The budget planning framework for 2025/26 reaffirmed the need to progress the Council on a path towards financial sustainability including conserving an appropriate and prudent level of financial resilience, of which the Council's reserves are a key component. As a consequence, the final revenue budget proposals for 2025/26 did not include any use of reserves to meet recurrent revenue expenditure.

- 4.27 The delivery of a balanced budget position for 2025/26, alongside substantial budget recovery action within schools will be fundamental in maintaining financial stability and limiting any further impact upon the Council's reserves.

- 4.28 The continuing financial headwinds, increasing demand for services, funding uncertainty, and the need for £10.7m of service savings to be delivered present tangible ongoing budget risks for the year.

- 4.29 When this is considered alongside a significant budget gap to be resolved for 2026/27, and a challenging and uncertain funding outlook over the medium term, there remains ongoing challenge to the financial resilience of the Council.

- 4.30 The forecast budget deficit of £533,000 will need to be managed through the collective financial discipline that has been a feature of recent budgets.

- 4.31 As we move towards the next formal monitoring period, work will continue to deliver on the structured approach to tackling the underlying budget pressures, with particular importance assigned to tackling costs which have the ability to be recurrent for 2026/27 and beyond.

- 4.32 In order to deliver this, a range of mitigation measures will need to be implemented, including, but not limited to:

- Maximising all grant and income opportunities, including the transfer of core costs into grant where conditions allow

- Vacancy management with a strategic and thoughtful approach to the filling vacant posts that is in line with the needs of the service, and the longer term objectives of the Council
- Maximising the opportunity to meet the costs of organisational reform from capital receipts where regulations allow

4.33 Remaining budgetary risks

4.34 There remain specific budgetary risks that have the ability to further impact upon the revenue budget during 2025/26:

- **Further non-delivery of budget savings targets**, especially where these involve income generation, changes to structures, alternative delivery models or those involving community or other partners.
- The trend of **reducing debt recovery**, particularly within Council tax and Social Care where there has been a slowing down in collection rates, and where there are increasing numbers of discounts and exemptions being awarded;
- **The recruitment market** remains challenging, with some services encountering difficulty hiring and retaining suitably qualified and skilled staff. Whilst this will result in a reduction in immediate expenditure, it will impact the ability to deliver services in line with the Councils objectives.
- **CPI inflation** rose by 3.8% in the 12 months to July 2025, up from 3.6% in June 2025 and the highest since January 2024. This is above budgeted assumptions. Current projections suggest that inflation will rise to 4% over the coming months before easing. This has the consequence of increasing costs and contracts agreed over the remainder of the financial year.
- **Schools reserve balances** – the further forecast draw on balances for 2025/26 of £2.8m would significantly increase the cumulative schools reserve deficit that is being carried on the Council's balance sheet. This consequently impacts upon the Council's overall financial resilience and increases its risk exposure by reducing available balance sheet resources.

5 RESOURCE IMPLICATIONS:

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

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

- 6.1 This report provides Members with an update on the progress being made against the revenue budget of the Authority and carries no decisions. There are therefore no equality and future generations' implications directly arising from this report.

CONSULTEES:

Senior Leadership Team
Cabinet
Performance and overview committee

BACKGROUND PAPERS:

Appendix 1 – Summary service variances
Appendix 2 – Detailed service variances and commentary
Appendix 3 – Progress against budgeted savings
Appendix 4 – Individual school balance forecasts

AUTHORS:

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Appendix 1 – Summary of service variances forecast

Directorate	Forecast Overspend / (Underspend) (£000s)	% Variance to budget	Overspend	Underspend
Social Care, Health & Safeguarding	1,074	1.4%	Children's services £598k – Primarily additional Counsel costs of £293k and reduction in WG grant £274k	
			Adult services £201k – level and complexity of care needs tracking slightly above budgeted levels	
			Housing & Homelessness £238k – Delay in opening of Severn view and repair costs to B&B premises	
Children, Learning, Skills & Economy	40	0.1%	Central budgets £40k – Various smaller over spends relating to management staff costs, income reductions and ICT costs	
Infrastructure	(61)	-0.3%	Passenger transport £392k – Shortfall in meeting pupil transport route savings £265k, reduced income & vehicle/staffing adjustments taking longer than anticipated £127k	Grounds Maintenance £76k - staff savings and increased fee income
			Fleet Maintenance £171k – fuel, hire charges and EV charging inspection and maintenance	Decarbonisation £152k – increased income from the Solar farm, staff vacancies, offset by inability to meet corporate mileage savings
				Schools catering £93k – increased grant and staff vacancies
				Waste £285k – one-off dividend from incineration partnership alongside savings in disposal and recycling contracts, and some staff savings
Place & Community Wellbeing	141	1.8%	Car parking £109k – under recovery of fixed penalty charges and higher than anticipated publication costs	

Directorate	Forecast Overspend / (Underspend) (£000s)	% Variance to budget	Overspend	Underspend
			Culture & Community Learning £38k – staffing costs, inflationary impact on some contracts	
People, Performance and Partnerships	99	2.1%	Communications £88k - Staffing structure changes and reduction in income.	Contact Centre - £39k – system and licence spend coming in below budget
			Community & Partnership developments - £50k - Tour of Britain cycling contribution and requirement for security, road closures, and cleansing	Payroll & System Support - £73k – reduction in system and supplies & services spend and staff vacancy
			People Management - £44k – unachievable staff vacancy factor and extra staff resource being put in place to bolster team capacity	
			Subscriptions - £32k – costs have exceeded available budget, in addition the membership of New Local was renewed which was an agreed budget saving	
Legal & Governance	64	2.1%	Members - £54k – overspend against superannuation contributions plus an inability to achieve vacancy factor savings, coupled with an increase in Mod Gov system charges.	Staff savings - £22k
			Legal - £32k – inability to achieve staff vacancy factor savings and an anticipated reduction in court fee income	
Resources	(95)	-1.0%	Newport leisure park £44k – the income surplus of £278k is £44k below budget due to unbudgeted utility costs associated with a vacant unit	Finance/Audit £58k – grant income and staff vacancies
			Castlegate £90k - increased operating costs associated with vacant units that fall to the authority to manage	Building cleaning & Public conveniences £130k – part-year staff vacancies as the service implements a restructure, as well as savings on maintenance and business rates in public conveniences.

Directorate	Forecast Overspend / (Underspend) (£000s)	% Variance to budget	Overspend	Underspend
			County Farms & Industrial units £78k – Void Property Costs (£50k) from covering running costs of vacant farms and cottages. Professional Fees (£20k) for valuations and succession reports needed for tenancy management	Landlord services £94k - staff vacancies offset by a shortfall in other rental income
Corporate & Treasury Management	458	1.1%	Earmarked reserves £535k – unbudgeted contribution to Council Tax Premium reserve is forecast. This will be mirrored by a corresponding underspend within Council tax	Lower net borrowing costs £50k - reflective of higher than anticipated cash balances, forward starting loans, and capital slippage.
Financing	(1,186)	-0.5%		Council tax reduction scheme £400k - cases have tracked slightly lower than budgeted for the year
				Council tax £250k – changes in the domestic registration list of properties chargeable has resulted in an increase of income forecast
				Council tax premiums £535k – The collection rate is currently higher than anticipated when setting the budget
Total	533	0.2%		

Section 1	Revenue budget summary forecast
Section 2	Detailed service commentary
Section 3	School balances update

Section 1 - Overall Revenue Position

Table 1: 2025/26 Revenue budget forecast by directorate

Service Area	Original Budget 2025/26	Budget Adjustments	Revised Annual Budget	Forecast Outturn	Forecast (Under) / Over Spend @ Update 1
	'000's	'000's	'000's	'000's	'000's
Social Care, Health & Safeguarding	77,916	66	77,982	79,056	1,074
Learning, Skills & Economy	73,030	(395)	72,635	72,675	40
Infrastructure	21,442	20	21,462	21,402	(61)
Place & Community Wellbeing	7,460	172	7,632	7,773	141
People, Performance & Partnerships	4,596	59	4,655	4,754	99
Legal & Governance	3,050	39	3,089	3,153	64
Resources	9,353	(137)	9,216	9,121	(95)
Corporate, Treasury & Finance	29,147	350	29,497	29,470	(27)
Net Cost of Services	225,994	175	226,169	227,403	1,234
Appropriations	10,784	(175)	10,609	11,094	485
Expenditure to be Financed	236,778	0	236,778	238,497	1,719
Financing	(236,778)	0	(236,778)	(237,964)	(1,186)
Net General Fund (Surplus) / Deficit	0	0	0	533	533

Table 2: 2025/26 Revenue budget forecast by service

Service Area	Original Budget 2024/25	Budget Adjust-ments	Revised Annual Budget	Forecast Outturn	Forecast (Under) / Over Spend @ Update 1
	'000's	'000's	'000's	'000's	'000's
Adult Services	47,536	8	47,544	47,745	201
Children Services	24,105	40	24,145	24,743	598
Housing & Homelessness	2,512	(21)	2,491	2,729	238
Public Protection	1,886	0	1,887	1,881	(5)
SCH Support	1,877	39	1,916	1,958	42
Social Care, Health & Safeguarding	77,916	66	77,982	79,056	1,074
Economy, Employment & Skills	853	(48)	805	805	0
Emergency Planning	178	0	178	178	0
Individual Schools Budget	58,790	0	58,790	58,796	6
Resources	1,217	(50)	1,167	1,198	31
Standards	11,992	(297)	11,695	11,698	3
Learning, Skills & Economy	73,030	(395)	72,635	72,675	40
Enterprise, Housing & Community Animation	559	(213)	345	348	2
Facilities, Fleet & Decarbonisation	11,692	31	11,723	12,332	609
Neighbourhood Services	8,668	(4)	8,664	8,283	(381)
Operations	523	206	729	439	(291)
Infrastructure	21,442	20	21,462	21,402	(61)
Culture and Community Learning	2,394	(18)	2,375	2,413	38
Countryside, Destination and Environment	1,149	6	1,154	1,140	(14)
Leisure and Wellbeing	1,764	(121)	1,643	1,643	(0)
Performance, Finance and Resources	1,639	130	1,768	1,763	(5)
Placemaking, Highways & Flooding	515	175	691	814	123
Place & Community Wellbeing	7,460	172	7,632	7,773	141
Chief Executives Office	1,197	71	1,268	1,384	117
People	1,934	(10)	1,924	1,910	(14)
Policy, Scrutiny & Customer Service	1,466	(2)	1,464	1,460	(4)
People, Performance & Partnerships	4,596	59	4,655	4,754	99
Democratic Services	1,957	39	1,996	2,035	39

Legal and Land Charges	1,093	0	1,093	1,118	25
Legal & Governance	3,050	39	3,089	3,153	64
Commercial, Corporate & landlord Services	2,133	(58)	2,075	2,047	(27)
Corporate Health & Safety	163	0	163	163	0
Finance	4,061	(79)	3,982	3,924	(58)
Information Communication Technology	2,996	0	2,996	2,986	(10)
Resources	9,353	(137)	9,216	9,121	(95)
Precepts & Levies	28,699	0	28,699	28,666	(33)
Coroner's	278	0	278	297	19
Archives	228	0	228	228	0
Corporate Management	452	0	452	439	(13)
Non Distributed Costs (NDC)	387	0	387	387	0
Strategic Initiatives	(2,820)	350	(2,470)	(2,470)	0
Insurance	1,923	0	1,923	1,923	0
Corporate Costs & Levies	29,147	350	29,497	29,471	(27)
Net Cost of Services	225,994	175	226,169	227,404	1,234
Interest & Investment Income	(788)	0	(788)	(1,045)	(257)
Interest Payable & Similar Charges	7,624	0	7,624	8,047	423
Charges Required under Regulation	6,158	0	6,158	5,943	(215)
Other Investment Income	0	0	0	(1)	(1)
Borrowing Cost Recoupment	(3,918)	0	(3,918)	(3,918)	0
Contributions to Reserves	2,483	0	2,483	3,018	535
Contributions from reserves	(775)	(175)	(950)	(950)	0
Contribution from Council Fund	0	0	0	0	0
Appropriations	10,784	(175)	10,609	11,094	485
Expenditure to be Financed	236,778	(0)	236,778	238,498	1,719
General Government Grants	(100,637)	0	(100,637)	(100,637)	0
Non Domestic Rates	(34,612)	0	(34,612)	(34,612)	0
Council tax	(110,596)	0	(110,596)	(111,381)	(785)
Council Tax Benefit Support	9,066	0	9,066	8,666	(400)
Financing	(236,778)	0	(236,778)	(237,964)	(1,186)

Net General Fund (Surplus) / Deficit	0	0	0	533	533
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Section 2 - Directorate – Service Variance Comments

SOCIAL CARE, HEALTH & SAFEGUARDING	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	1,074	0	0	0

CHIEF OFFICER COMMENTARY

The overall position for the directorate is showing a forecast overspend of £1.074m.

The pressures within adult services predominantly relate to the cost of care and the number of people requiring costly packages of care due to the needs being presented to the service. Whilst the progress is being made in increasing the numbers of people benefitting from reablement, this is not able to fully mitigate the need for care particularly within adult placements. The service and practice changes that have been put in place are starting to take effect in terms of mitigated the cost and requirement for care, but there is still more to do.

In children's services, the costs of placements are holding steady, however, pressure has arisen through the need to maintain family support despite the loss of some WG grants. Family support is essential to avoid significant increases to placement costs as well as securing better outcomes for children.

Both adults and children services are predicated on demand rates holding steady – which is not easy to predict, particularly heading into the winter period.

In housing the opening of Severn View should help mitigate pressure moving forward; however, rising operating costs and rent and debt arrears within private leasing needs to be explored further for potential mitigation.

Adult Services

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	201	0	0	0

The position at update 1 highlights a projected year end overspend of £201k, which is a more favourable position when compared with update 1 last year.

It is a somewhat complicated picture across the service however where the main pressure includes the full year effect of care provision and adult placements made at the end of the previous financial year.

The current position is predicated on maintaining stable demand; however, winter is a notoriously unpredictable and challenging time for adult services where ongoing pressure from both community and hospital settings is likely to arise. Our residential placements continue to rise and are currently at the highest ever level of 357 across the County. Despite there being a stable level of demand of referrals into the service, more referrals are leading to the need for services. In comparison, domiciliary care is trending down, although this could change.

Our service transformation plan to expand reablement is moving forward with the number of people receiving reablement increasing. This represents cost avoidance for the Local Authority as we continue to reduce the number of people who do not need care and support at the end of a period of reablement.

The significant underspend on staff vacancies in Care at Home is supporting the financial position. A workforce re-modelling exercise is underway and it is likely that recruitment will be a requirement once the structure has been finalised, but we are currently taking steps to mitigate any effect on the budget.

The savings target of £250k is not yet evidenced; however, our review activity has significantly increased. For the first time we met our 70% target of the number of care and support plans reviewed at the end of 24/25 increasing to 74% at the end of the first quarter of 25/26. Savings achieved by reducing packages of care via the review process are already captured in the bottom line and we are still validating the data to demonstrate actual impact.

We are still experiencing difficulties in progressing CHC cases for younger people with mental health and learning disabilities that is impacting on our ability to move eligible adults into health service budgets. This is an issue for all Welsh Local Authorities. The regional team are in the process of appointing a CHC lead to act on behalf of the Gwent region to address our concerns and gather information with a view to progressing a legal challenge.

Despite the unpredictability of the coming months, the service continues to take every opportunity to adopt cost avoidance approaches to care, our information advice and assistance service (IAA) will be implemented during the latter part of this year with recruitment of 6 posts currently underway. This allows us to develop our preventative offer and will feed our new intake model where reablement is the first consideration to mitigate or prevent care.

Domiciliary care commissioning has concluded in the South. We anticipate this will stabilise cost and improve capacity in the area of most demand.

MCC has had confirmation of a £900k recurring annual funding stream from Welsh Government to support the work that social care does to prevent delayed discharges. This money is subject to a spend plan that will support our transformation work but the actual spend against the whole year allocation and impact against our bottom line is yet to be confirmed.

Children's Services

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	598	0	0	0

At the end of update 1 there are 190 children looked after including 15 unaccompanied asylum-seeking children. Although the number remains stable, the service activity of assessment, family support and risk management remains intense. During this first 4 months of the year 15 children became looked after and 15 children left care. Nevertheless, the service is currently showing a balanced budget for placement costs which is an improvement from previous years.

The overspend reported at update 1 is partly due to the use of external counsel / barrister costs for children who are in a public law process in the family courts. This represents a pressure of £293,262 based on current activity. As at update 1 there were 22 children (16 families) within the family courts. The service only refers children to the family court if it is the only way to secure a child's safety and long-term stability / welfare. The costs associated with a court process are high, and the use of barristers is often unavoidable. In terms of corrective action the service will continue to liaise with the legal team to explore any potential to reduce the costs associated with court.

The other element of the reported overspend relates to pressure that has arisen through a reduction in the Welsh Government grant that supports our Family Support services. This is a pressure of £274k. Family support is critical to supporting children to remain safely at home wherever possible and helps both to safely reduce the numbers of children who need to come into care and safely return children to their families and communities at the earliest opportunity. Although it represents a cost pressure, the service has maintained family support despite the significant reduction in the WG grant. Family support is fundamental to cost avoidance (particularly given the costs of placements) and helps us to secure best outcomes for children and families. The majority of children open to children's services (normally around 550 at any one time) will be

receiving family support of some description, with many others receiving services through early help and community based support. If these services were disrupted or reduced more children would need to come into care.

The current overspend position is predicated on there being no new high-cost demand into the service and on the service achieving 100% of the required service savings. Whilst this is currently on track, there are risks. New demand within the service is not always predictable. The savings are based on our care planning and progression for children, which can on occasions may need to change.

HOUSING & HOMELESSNESS

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'s	238	0	0	0

Housing services is showing an overspend of £238k.

The main reasons are the delay in the opening of Severn View and some additional costs of repairs to B & B premises following hand back representing £154k pressure. Severn View is now operational which should alleviate future pressure on homelessness / temporary accommodation provision (dependant on stable demand patterns).

An additional financial pressure of £186k has emerged within private leasing, driven by increased repair, maintenance, and cleaning costs, alongside reduced income due to rent arrears and bad debt. The area presents a financial risk that warrants further review to identify potential mitigations.

The bottom-line position within housing has benefitted from £197k due to the Housing benefit clawback reduction.

Public Protection

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'s	(6)	0	0	0

This division, even though the first forecast of the year, is forecast to be close to its allocated budget.

SCH Support

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'s	42	0	0	0

There is a £42k budget pressure currently forecast in SCH support due to changes in payroll costings following the Chief officer pay review, changes to employer national insurance contribution rates, and from pay awards.

Learning, Skills & Economy DIRECTORATE

Deficit / (Surplus) £'000s	40	0	0	0
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CHIEF OFFICER COMMENTARY

The Directorate's current position is a forecasted overspend of £39,751, which is mainly due to an increase in management costs and a reduction in income (please see further detail in Resources below).

Economy, Employment & Skills

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

Economy, Employment & Skills are currently reporting a balanced budget

Emergency Planning

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

Emergency Planning are currently reporting a balanced budget

Individual Schools Budget

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	5	0	0	0

There is currently a small forecasted overspend due to several small, unexpected costs relating to schools

Resources

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	31	0	0	0

The current forecasted overspend of £31,007 is due to the following:

- £15,779 increase in management staff costs, due to the restructure
- £9,488 reduction in income, as we no longer receive income for the administration of the EIG, now that it is part of the LA Education Grant
- £5,740 SIMS costs not budgeted

Standards

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

There is currently a small forecasted overspend of £3,223, which is mainly due to Agency costs covering an absence.

Whilst there is not a financial impact at this stage, it is important to note that the ALN LA IDP Budget is currently overspent by £108k, but this can be offset with the reduction in the Independents Budget, as several pupils have recently left independent placements.

INFRASTRUCTURE DIRECTORATE

Deficit / (Surplus) £'000s	(61)	0	0	0
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CHIEF OFFICER COMMENTARY

Whilst the Directorate is forecasting a £61k underspend this is largely due to a one off share receipt from our waste incineration partnership with Cardiff County Council and increased income from the solar farm. The Directorate is still managing financial pressures amounting to £563k from home to school transport and fleet. Changes to the home to school policy have not realised the savings target due to walking route assessments and a changed learner cohort from the time of the initial forecasts. Work will continue to identify opportunities to mitigate the pressures in fleet through different tenure models.

Enterprise				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	2	0	0	0
Small overspend due to the inability to fully meet staff vacancy savings.				
Facilities & Fleet				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	563	0	0	0
Facilities and Fleet is forecasting a projecting a £563k overspend, due to:				
<ul style="list-style-type: none"> • Fleet Maintenance - £171k overspend – Fleet Maintenance is forecasting a £171k overspend, driven by early-year pressures including increased fuel costs, hire charges, and EVCI maintenance expenses. The service will continue to monitor vehicle utilisation closely with the aim to reducing this overspend by year end. • Passenger Transport – net £392k overspend – The service is currently forecasting a £265k shortfall against the £447k catchment area saving built into the 2025/26 budget. Pupil figures have changed since original projections were prepared and some routes have been deemed unsafe meaning transport still has to be provided. From September, early forecasts suggest savings of only £26k per month on contracts, significantly below original assumptions. <p>Internal operations are also under pressure, as contract changes have reduced income and adjustments to vehicle and staffing costs are taking time to implement. These overspends have been partially offset by transport admin grant income. The service is actively exploring mitigation options, but accurate figures will not be available until pupil numbers and contracts are confirmed in September.</p>				
Neighbourhood Services				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(381)	0	0	0
Neighbourhood services is forecasting to return a £381k underspend, broken down as follows:				
<ul style="list-style-type: none"> • Waste Services - £285k underspend – this is primarily due to a one-off gain share receipt from Cardiff City Council related to the waste incineration partnership. This resulted from an improvement in green and trade waste income. Additionally, forecasted savings on disposal and recycling contracts, as well as savings in staff costs due to part-year vacant posts, contributed to the underspend. However, recycle prices are volatile, so this could change. Notice is also awaited from the Welsh Government on the Sustainable Waste Grant award, where a lower-than-budgeted allocation could reduce the underspend. • Grounds Maintenance - £76k underspend – this is due to staff savings from part-year vacant posts and an anticipated increase in fee income. • Highways Operations & External Clients – On Budget • StreetLighting – On Budget • Highways Design, Flooding & Road Safety – £20k net underspend – this is due to reduced expenditure on professional fees and supplies & services across the department, these savings have 				

been partially offset by increased costs associated with flooding including for tide watches and sandbagging provision.

Operations

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(245)	0	0	0

Operations is forecasting to underspend by £245k, due to:

- **Schools Catering** - £93k underspend – mainly due to part-year staff vacancy savings and favourable UFSM income.
- **Decarbonisation** - £152k underspend – this is primarily due to increased income from our solar farm and renewables portfolio due to improved ROC rates, favourable weather and improved inverter performance (£184k) and a £45k staff saving in the decarbonisation team due to a vacant post, offset by an overspend in a prior year corporate mileage saving of £77k where the proposal has been delayed by procurement issues and won't be rolled out until later in the year.

PLACE & COMMUNITY WELLBEING

Update 1	Update 2	Update 3	Update 4
142	0	0	0

CHIEF OFFICER COMMENTARY

The Place and Community Wellbeing Directorate is currently forecasting an overspend of £142k. This is primarily due to income pressures related to the under recovery of parking penalty charges and building control fees.

Overall, the directorate is actively monitoring these variances and exploring mitigation options to ensure financial stability and continued service delivery.

Culture and Community Learning

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	38	0	0	0

The Culture and Community Learning division is projected to experience an overspend of £38k. This is primarily due to higher than budgeted staffing costs, inflationary pressures and increased expenses relating to supplies and services contracts.

Countryside, Destination and Environment

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(14)	0	0	0

The Countryside, Destination and Environment division is forecast to underspend by £14k due to higher than budgeted income.

Leisure and Wellbeing

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

The Leisure and Wellbeing division expects a balanced budget, as higher income from leisure facilities has offset the £89k loss of income due to Abergavenny LC's closure and reduced service agreement income.

Performance, Finance and Resources

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(5)	0	0	0

The Performance, Finance and Resources division is forecasting a small underspend of £5k due to staff vacancies.

Placemaking, Highways & Flooding

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	123	0	0	0

The Placemaking, Highways and Flooding division is forecasting to overspend by £123k due to:

- **Development Management and Building Control** – The section is forecasting an overspend of £14k, relating to under-recovery of building control fees and increased software costs.
- **Planning Policy** – This section is currently on budget. Spending levels will be closely monitored and aligned with the approval of the RDLP.
- **Highways Development and Car Parks** – The section is forecast to overspend by £109k. This is mainly due to the under recovery of fixed penalty charges and higher than anticipated publication costs associated with the implementation of the new fees and charges.
- **Strategic Projects** – This area is currently on budget

PEOPLE, PERFORMANCE & PARTNERSHIPS

	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	106	0	0	0

CHIEF OFFICER COMMENTARY

People, Performance & Partnerships and the Chief Executives Office is forecasting to over spend by £106k. The overall picture within PPP masks variability within services, particularly staffing budgets. There is still a degree of risk attached to changes to the Welsh language translation service which need to be fully implemented in the second half of the year. In year staffing savings made in HR during 2024-25 have proved difficult to maintain resulting in an overspend in 2025-26 as capacity has been bolstered. Within the CEO's Office, the overall forecast reflects a mixed financial position. Overspends are primarily driven by staffing pressures, reduced income, and an unbudgeted contribution to the Tour of Britain event. Some areas are offset by underspends, but key pressures remain that officers will look to mitigate as the year progresses.

Chief Executives Office

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	125	0	0	0

The Chief Executives Office is forecasting a £125k overspend, this is due to:

- **Communications** - £88k overspend – This is primarily due to a budget pressure of £56k for the creation of the Head of Communications and Active Travel post, and a £50k reduction in income. These pressures are partially offset by £37k relating to the secondment of the Head of Communications.
- **Contact Centre** - £39k underspend – due to system and licence spend coming in below budget.

- **Strategic Change** - £15k overspend – due to insufficient budget to cover our City Deal contribution.
- **Community & Partnership developments** - £50k overspend - Tour Of Britain has no budget provision to cover the £25k contribution to TOB organisers plus the estimated £25k required for security, road closures, and cleansing.
- **Libraries, Hubs, and Community Learning** – Forecast to underspend by £20k due to staff vacancies and higher than budgeted income.
- **Strategic Operations** - £8k overspent – inability to make vacancy factor savings.

People

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(14)	0	0	0

People is forecasting to underspend by £14k, due to:-

- **Organisational Development** - £15k overspend – due to staff costs exceeding budget due to the inability to achieve vacancy factor savings.
- **Payroll & System Support** - £73k underspend – due to a reduction in system and supplies & services spend of £39k and a net staff saving in staff costs of £27k due to changes in hours and a payroll technician post being held vacant.
- **People Management** - £44k overspend – additional costs incurred due to unachievable staff vacancy factor and extra staff resource being put in place to bolster team capacity.

Policy, Scrutiny & Customer Service

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

Policy, Scrutiny & Customer Services is forecasting to underspend by £4k, broken down as follows:

- **Corporate** - £17k overspend – mainly due to the inability to achieve staff vacancy factor savings and an increase in subscription costs.
- **Scrutiny** - £4k overspend – unable to achieve staff vacancy savings.
- **GIS** - £21k underspend – saving in system and supplies & services spend.
- **Levies & Subscriptions** - £32k overspend – corporate subscription costs (WLGA, LGA) have exceeded available budget, in addition the authority has made the decision to renew the membership of New Local causing a further pressure as this budget was removed as part of 25/26 budget savings.
- **Performance & Data** - £19k underspend – due to staff savings from part year vacant posts.
- **Equalities & Welsh Language** - £3k underspend – the authority is due to enter into a new translation SLA with Torfaen Council in October, with current projections indicating that this will generate a 3k saving.
- **Community Safety** – Net £15k underspend – due to staff savings from part year vacant posts.

LAW & GOVERNANCE DIRECTORATE

	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	64	0	0	0

CHIEF OFFICER COMMENTARY

Law & Governance is forecasting to overspend by £64k mainly due to staffing pressures and income shortfalls across the service areas. Officers will look to mitigate these in the coming months and will provide an update on progress at Month 6.

Democratic Services				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	39	0	0	0
<p>Democratic services is forecasting to overspend by £39k, this is due to:</p> <ul style="list-style-type: none"> • Members - £54k overspend – mainly due to staffing where there is an overspend against superannuation contributions plus an inability to achieve vacancy factor savings, coupled with an increase in Mod Gov system charges. • Committee & Election services - £15k underspend – primarily as a result of 2 staff retirements and the saving generated from the delay in filling the posts. 				
Legal and Land Charges				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'s	25	0	0	0
<p>Legal & Land Charges is forecasting to overspend by £25k, due to:</p> <ul style="list-style-type: none"> • Legal - £32k overspend – This has been caused by the inability to achieve staff vacancy factor savings and an anticipated reduction in court fee income. • Land Charges - £7k underspend – due to savings from a vacant part-time post. 				
RESOURCES DIRECTORATE				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(95)	0	0	0
CHIEF OFFICER COMMENTARY				
<p>It is pleasing to see a small net underspend being forecast for this first formal reporting period. The majority of the under spend has resulted from vacancies across Landlord Services and Building Cleaning along with savings forecast against some non-pay budgets. With recruitment currently being progress vacancy savings will be one-off in nature as posts are successfully filled.</p> <p>This under spend has been offset by overspends against investment properties and county farms resulting from increased operating costs, fees and unbudgeted costs resulting from a small number of vacant units. These overspends will be mitigated where tenancies can be secured for the remaining lettings, contributing to a further strengthening of the directorate's financial position this year.</p>				
Commercial, Corporate & landlord Services				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(27)	0	0	0
<p>Commercial, Corporate and Landlord services is forecasting to underspend by £27k, due to:</p> <ul style="list-style-type: none"> • Investment Properties - £135k overspend, due to: <ul style="list-style-type: none"> ○ Newport Leisure Park - £44k overspend – NLP is forecasting to generate a surplus of £278k in 25/26, however this is £44k below budget due to unbudgeted costs (such as electricity and rates) associated with a vacant unit. There is potential for this position to improve if a tenant can be found for the unit during the year. ○ Castlegate Business Park - £90k overspend – The overspend is driven by increased operating costs associated with vacant units that fall to the authority to manage, including higher-than-expected rates, electricity charges, and one-off fees. As above there is potential for this position to improve if tenants can be found during the year. 				

- **Landlord Services** – £94k underspend – mainly due to staff vacancy savings offset by a shortfall in rental income. The Head of Landlord services has now been appointed, and it is anticipated that the current service vacancies will be addressed as part of a wider management and portfolio review.
- **County Farms** - £78k overspend: Mainly due to (1) Void Property Costs (£50k) from covering running costs of vacant farms and cottages, which aren't included in the base budget. This issue is expected to resolve next year as a farm has been re-let and cottage disposals are being considered. (2) Professional Fees (£20k) are higher because of increased demand for valuations and succession reports needed for tenancy management.
- **Cemeteries** – £17k under spend primarily due to savings on supplies and services. There is potential that this could change if any unforeseen repairs or emergency tree works are required later in the year.
- **Building Cleaning & Public Conveniences** - £130k underspend – due to full and part-year staff vacancies as the service implements a restructure, as well as savings on maintenance and business rates in public conveniences.
- **Property Services** – On Budget - the service is forecasting overspends on maintenance and rates within office accommodation and a shortfall in external fees but these have been offset by employee underspends due to managed staff vacancies.

Corporate Health & Safety

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

Corporate Health & Safety is forecasting a balanced budget, any costs incurred in response to directorate H&S matters will be accommodated from within services and reported as part of their outturn position.

Finance

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(58)	0	0	0

The Finance division is forecasting to under spend by £58k, this is mainly due to:

- **Revenues, Systems & Exchequer** - £54k net underspend:
 - **Benefits** - £40k underspend - A reduction in non-pay costs and additional grant income is forecast to save £31k and the Housing Benefit Budget is currently forecast to underspend by £9k.
 - **Council Tax** - £12k overspend - The majority of spend pressures for this cost centre are managed by one off Welsh Government grant income for the administration of this year's Retail Rate Relief scheme. The remaining £11k overspend relates to a residual budget pressure from the Finance restructure which was left against this cost centre.
 - **Charity Relief** - £3k underspend – early indications are awards will be lower than budget.
 - **Debtors** - £4k overspend - Unmet vacancy factor savings and additional National Insurance costs.
 - **Cashiers** - £7k underspend - Card payment fees are estimated to over spend by £26k, as more payments are made by card. However these additional costs are offset by reduced security carrier costs, holding off system developments and holding open, for a time, a cashier vacancy to generate an overall saving against this cost centre.
 - **Revenues System Administration** - £18k overspend - due to increased annual contract costs for the Northgate system.

- **Financial Systems Support & Vat** - £39k underspend – a £21k saving resulting from vacant posts plus an £8k saving against the non-pay budget and £10k additional recharge income.

- **Finance** - £12k under spent - due to part year staff vacancies.

Information, Communication & Technology

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(10)	0	0	0

The ICT division is forecasting to underspend by £10k, this is due to:

- **SRS** - £10k overspend – the latest forecasts from SRS indicate that our contribution will be £10k over budget due to increased costs in O365 licences and PSBA line rental.
- **Digital, Design & Innovation** – On budget – As of August 2025, the team moved under the Shared Resource Service (SRS) via the Cabinet-approved Digital, Data and Technology agreement. This caused a forecasted £33,000 overspend due to higher collaboration costs, exceeding the current budget. In line with Cabinet's decision, this shortfall will be covered by the IT reserve, so there is no negative effect on the Directorate's overall financial position.
- **Cyber Security Partnership** - £13k underspend - the Cyber Security Partnership is scheduled to transfer to SRS from 1st September 2025 and indications are that we will see an in-year underspend of £13,000 due to vacancy savings.
- **Telephony** - £6k underspend – due to a reduction in call charges.

CORPORATE COSTS & LEVIES DIRECTORATE

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

Coroners

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	18	0	0	0

Final levy is expected to be higher than budgeted due to additional requirements of the services following Chief Coroner review.

Precepts & Levies

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(33)	0	0	0

Forecast saving due to the South Wales Fire Service precept being lower than originally anticipated for the financial year.

Archives

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

No variance forecast

Corporate Management

Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(13)	0	0	0

Minor unbudgeted income that cannot be attributed to services				
Non-Distributed Costs				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast				
Strategic Initiatives				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast				
Insurance				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast				
TREASURY & RESERVES				
Deficit / (Surplus) £'000s	486	0	0	0
Interest & Investment Income				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(257)	0	0	0
Higher than anticipated cash balances along with higher than budgeted rates have increased the return on the authorities investments leading to a forecast underspend of £257k.				
Interest Payable & Similar Charges				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	423	0	0	0
The rate payable on new borrowing has not decreased as previously projected. Additionally, additional borrowing undertaken late in the previous year has contributed to a forecasted overspend of £423k.				
Charges Required Under Regulation				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(215)	0	0	0
Capital slippage funded from borrowing was higher than anticipated at the end of the previous year which has resulted in lower than anticipated charges.				
Other Investment Income				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	(1)	0	0	0
Minor income received.				

Borrowing Cost Recoupment				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast.				
Contributions to / from Reserves				
Outturn Forecast	Update 1	Update 2	Update 3	Update 4
Deficit / (Surplus) £'000s	535	0	0	0
An unbudgeted contribution to Council Tax Premium reserve is forecast. This will be mirrored by a corresponding underspend within Council tax.				
FINANCING				
Update 1	Update 2	Update 3	Update 4	
Deficit / (Surplus) £'000s	(1,185)	0	0	0
Council Tax Reduction Scheme				
Update 1	Update 2	Update 3	Update 4	
Deficit / (Surplus) £'000s	(400)	0	0	0
Anticipated underspend as in year caseloads are lower than the budget set.				
Council Tax				
Update 1	Update 2	Update 3	Update 4	
Deficit / (Surplus) £'000s	(785)	0	0	0
The Council Tax Premium collection rate is currently higher than anticipated when setting the budget which results in forecast additional income of £535,000. Alongside this, the changes in the domestic registration list of properties chargeable has resulted in an increase of income forecast of £250,000.				
General Government Grants				
Update 1	Update 2	Update 3	Update 4	
Deficit / (Surplus) £'000s	0	0	0	0
No Variance forecast				

2. Section 3 – School Balances

- 2.1. 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	(A) Opening Balances (Surplus) / Deficit Position 2025/26 £000's	(B) Draw / (Contribution) on School Balances @ Update 1 £'000	(C) Draw / (Contribution) on School Balances @ Update 2 £'000	(D) Draw / (Contribution) on School Balances @ Update 3 £'000	(E) Draw/ (Contribution) on School Balances @ Update 4 £'000	(A+B) Forecast 2025/26 Balances £'000
Cluster						
Abergavenny	1,351	635	0	0	0	1,985
Caldicot	(37)	641	0	0	0	604
Chepstow	989	26	0	0	0	1,015
Monmouth	144	407	0	0	0	552
Special	1,645	1,126	0	0	0	2,771
Total	4,092	2,835	0	0	0	6,926

- 2.2. Collective School balances at the beginning of the Financial Year amounted to a deficit of £4,091,578. The anticipated further draw on reserves is £2,834,735, against a budgeted draw on reserves of £2,714,668, resulting in a forecast deficit balance of £6,926,313 by year end.

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

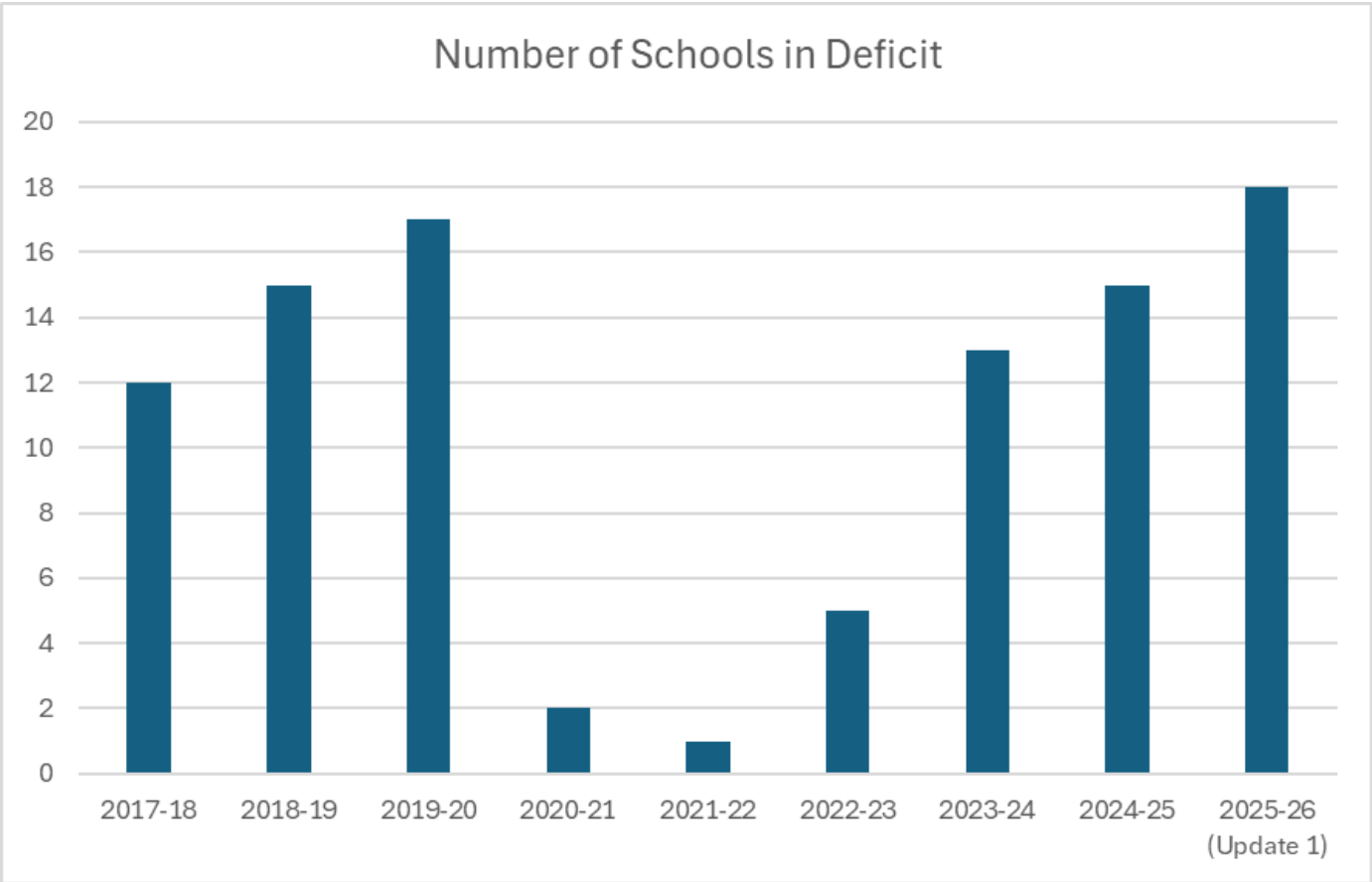
Start of year	Update 1	Update 2	Update 3	Update 4
Total: 15	Total: 18	Total:	Total:	Total: 0
KHS VIII 3-19	KHS VIII 3-19			
Gilwern	Gilwern			
Our Lady & St Michael's	Our Lady & St Michael's			
Ysgol y Fenni	Ysgol y Fenni			
Caldicot School	Caldicot School			
Rogiet	Rogiet			
Ysgol y Ffin	Ysgol y Ffin			
Chepstow School	Chepstow School			
The Dell	The Dell			

Thornwell	Thornwell			
Kymin View				
Osbaston	Osbaston			
Overmonnow	Overmonnow			
Ysgol y Trefynwy	Ysgol y Trefynwy			
PRS	PRS			
	Castle Park			
	Monmouth Comprehensive			
	Cross Ash			
	Llandogo			

- 2.4. 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.
- 2.5. All schools that are budgeting to register a deficit balance at the end of the 2025/26 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 expected to be received by October Half Term.

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
2025-26 (forecast)	6,926

- 2.6. The decrease in school balances has resulted in an increase in the number of schools in deficit, as illustrated in the following table:



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Appendix 3 - Budget savings progress

	Savings proposals by Directorate	Budgeted Saving	Update 1 Forecast	Variance	% Met	
		£000	£000	£000		
	Social Care, Health & Safeguarding	(2,950)	(2,589)	361	87.8%	
	Learning, Skills and Economy	(745)	(745)	0	100.0%	
	Infrastructure	(5,679)	(5,254)	425	92.5%	
	Place & Community Wellbeing	(606)	(606)	0	100.0%	
	People, Performance and Partnerships	(165)	(104)	61	63.0%	
	Legal & Governance	(1)	(1)	0	100.0%	
	Resources	(555)	(555)	0	100.0%	
	Totals	(10,701)	(9,854)	847	92.1%	

Service savings progress

Ref	Social Care & Health	Budgeted Saving	Update 1 Forecast	Variance		Comment
		£000	£000	£000		
SCH S2	Community Meals - cost neutral or cease	(15)	(15)	0		
SCH S3	Adults Practice Change	(250)	0	250		Too early in year to ascertain full saving being delivered
SCH S4	Fees and Charges	(336)	(336)	0		
SCH S5	Public protection Workforce reduction	(100)	(100)	0		
SCH S6	Wedding fees (registrars)	(30)	(30)	0		
SCH S7	Childens Practice Change	(1,887)	(1,887)	0		
SCH S10	Adults workforce review	(125)	(125)	0		
C&P S20	Savings driven from the reduction of B&B usage and full year effect of Severn View	(207)	(96)	111		Saving assumed Severn View would be open from 1st April, but due to building delays tenants did not move in fully until early August - this meant we had to incur 4 months of additional of B&B costs that were not budgeted.
Total		(2,950)	(2,589)	361		

Service savings progress

Ref	Learning, Skills and Economy	Budgeted Saving	Update 1 Forecast	Variance		Comment
		£000	£000	£000		
CYP S1	Reduce 0.6 FTE Most (Monmouthshire Specialist Teachers) team	(40)	(40)	0		
CYP S3	Grant funding increase to meet costs of EWS post	(51)	(51)	0		EWS has not been reduced by 1 FTE, a grant funding increase was able to meet the costs of the EWS post
CYP S4	Bring ALN MCC pupils from OOC back to MCC	(100)	(100)	0		
CYP S5	KH8 Maintenance costs	(40)	(40)	0		
C&P S21	Youth Service - Passport more core service costs to grant funding.	(45)	(45)	0		
C&P S14	Reduction in utility costs for education estate	(429)	(429)	0		
ML S4	Reduction in Youth Service Provision (delete 1 FTE post)	(40)	(40)	0		
Total		(745)	(745)	0		

Ref	Infrastructure	Budgeted Saving	Update 1 Forecast	Variance		Comment
		£000	£000	£000		
C&P S4	Passenger Transport Commissioning - We revert to the statutory distances of 2 miles for primary and 3 miles for secondary - Subject to political approval - will commence from 01/09/2025	(447)	(182)	265		Pupil figures have changed since original projections were prepared and some routes have been deemed unsafe meaning transport still has to be provided. From September, early forecasts suggest savings of only £26k per month on contracts. The service is actively exploring mitigation options, but accurate figures will not be available until pupil numbers and contracts are confirmed in September. An update will be provided at M6.
C&P S7	Savings in C&P senior Mgt costs as a result of SLT restructure	(170)	(170)	0		Achieved - restructure completed - posts deleted.
C&P S8	Grass routes - Introduce an annual £10 membership charge for users	(3)	(3)	0		Achieved
C&P S9	Reduce gritter fleet by extending the working hours of each vehicle	(20)	(20)	0		Fleet reduced - achieved
C&P S10	Reduction in utility prices for the corporate estate	(136)	(136)	0		Early year projections are indicating that this saving will be achieved.

Service savings progress

C&P S11	Undertake energy audit of invoices to identify discrepancies and potential savings	(20)	(20)	0		Currently in process of appointing firm to undertake audit - assume achievable.
C&P S22	PTU Increase the cost of concessionary season tickets by 10%	(6)	(6)	0		Fees have been uplifted - saving will be achieved.
C&P S23	Increase in Highways fee income to external clients to reflect recovery of pay award and inflation.	(52)	(52)	0		Fees have been uplifted - saving will be achieved.
C&P S24	Indicative EPR funding	(4,825)	(4,665)	160		Final award was confirmed to be £160k under original figure - this has been managed by other savings within the service.
Total		(5,679)	(5,254)	425		

Ref	Place & Community Wellbeing	Budgeted Saving	Update 1 Forecast	Variance		Comment
		£000	£000	£000		
ML S1	Borough Theatre - Reduced production days (3 days a week)	(50)	(50)	0		
ML S5	Increase Income across the four Leisure Centres	(150)	(150)	0		
ML S7	Lease Old Station Tintern	(30)	(30)	0		
ML S9	Externalise Markets Waste Collection	(20)	(20)	0		
ML S13	S106 - Increase office time recharge	(24)	(24)	0		
ML S14	Rights of way - Charge officer time to capital	(20)	(20)	0		
C&P S2	Request to WG to increase statutory planning application fees by 25% - Consultation Autumn - potential uplift for 1st April or 1st October	(100)	(100)	0		
C&P S3	Increase car park fees by 10%	(180)	(180)	0		Carparking fees have been increased and delivering the saving the income pressure declared
C&P S15	Increase Building Control Fees	(32)	(32)	0		Fees have been uplifted.
Total		(606)	(606)	0		

Ref	People, Performance and Partnerships	Budgeted Saving	Update 1 Forecast	Variance		Comment
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Service savings progress

		£000	£000	£000		
CEO S2	Welsh Language translation	(82)	(82)	0		Set to enter into new SLA with Torfaen in October - early forecasts project that this saving will be achieved.
CEO S4	New staffing model in Systems and Payroll	(22)	(22)	0		Achieved
CEO S5	Implement Apprentice First approach	(8)	0	8		Currently no progress on this initiative - further update to be provided at Update 2
CEO S8	End membership of New Local from June 2025	(15)	0	15		Not achieved - decision made by senior leadership to continue with membership.
ML S12	Phase 2 - Restructure	(38)	0	38		Not Achievable
Total		(165)	(104)	61		

Ref	Legal & Governance	Budgeted Saving	Update 1 Forecast	Variance		Comment
		£000	£000	£000		
LG S1	Cancellation of LLG Training	(1)	(1)	0		Achieved
Total		(1)	(1)	0		

Ref	Resources	Budgeted Saving	Update 1 Forecast	Variance		Comment
		£000	£000	£000		
RES S1	Cease our Cyber Security Insurance provision	(98)	(98)	0		Achieved - insurance cover has ceased.
C&P S13	Building Cleaning - Release of recurrent service saving	(20)	(20)	0		Achieved
RES S3	Freeze/Remove Head of Digital, Design & Innovation Post (Net of cover/honoraria arrangements)	(64)	(64)	0		Achieved - Post deleted
RES S5	Finance - HB penalty will reduce as Severn view comes online and temporary accommodation reduces	(250)	(250)	0		Reduction in B&B usage down to 5 has had a beneficial impact on reducing the HB subsidy penalty - M4 forecasts project that this saving will be made in full.
RES S6	Finance - HB penalty reduction as a result of a further reduction in the remaining B&B portfolio.	(100)	(100)	0		

Service savings progress

RES S7	Reduction in Chief officer admin Support (0.6 FTE)	(23)	(23)	0		Achieved - Post deleted
Total		(555)	(555)	0		

Appendix 4 - Forecast movement in school balances

	Opening Reserves 2025-26 (Surplus)/Deficit	In Year position at Month 4 (Surplus)/Deficit	Projected carry forward at year end 2025-26 (Surplus)/Deficit	Risk Category
Abergavenny cluster				
King Henry V111 3-19 School	1,386,169	531,024	1,917,193	
Cantref Primary School	(101,495)	17,805	(83,690)	
Gilwern Primary School	15,717	83,675	99,392	
Goytre Fawr Primary School	(43,645)	31,121	(12,524)	
Llanfoist Fawr Primary School	(87,620)	51,334	(36,286)	
Llantillio Pertholey CiW Primary School (VC)	(74,764)	55,440	(19,324)	
Llanvihangel Crucorney Primary School	(83,609)	23,752	(59,857)	
Our Lady and St Michael's RC Primary School (VA)	53,889	(32,604)	21,285	
Ysgol Gymraeg Y Fenni	286,080	(127,045)	159,035	
Caldicot cluster				
Caldicot School	267,256	332,548	599,804	
Archbishop Rowan Williams CiW Primary School (VA)	(82,144)	40,907	(41,237)	
Castle Park Primary School	(18,741)	59,849	41,108	
Dewstow Primary School	(6,305)	(39,449)	(45,754)	
Durand Primary School	(93,396)	7,756	(85,640)	
Magor CiW Primary School (VA)	(206,124)	31,135	(174,989)	
Rogiet Primary School	169,213	12,383	181,596	
Undy Primary School	(142,211)	98,937	(43,274)	
Ysgol Gymraeg Y Ffin	75,216	97,023	172,239	
Chepstow cluster				
Chepstow School	1,130,990	(37,836)	1,093,154	
Pembroke Primary School	(268,044)	53,412	(214,633)	
Shirenewton Primary School	(130,917)	35,178	(95,739)	
St Mary's Chepstow RC Primary School (VA)	(70,363)	69,538	(826)	
The Dell Primary School	158,181	(53,505)	104,676	
Thornwell Primary School	168,782	(40,885)	127,897	
Monmouth cluster				
Monmouth Comprehensive	(31,922)	311,783	279,861	

Cross Ash Primary School	(14,677)	35,397	20,720	
Kymin View Primary School	63,486	(63,525)	(39)	
Llandogo Primary School	(7,412)	11,633	4,221	
Osbaston CiW Primary School (VC)	63,807	(5,118)	58,689	
Overmonnow Primary School	255,229	(37,483)	217,746	
Raglan CiW Primary School (VC)	(161,289)	81,235	(80,054)	
Trellech Primary School	(92,530)	11,456	(81,074)	
Usk CiW Primary School (VC)	(19,112)	(4,386)	(23,498)	
Ysgol y Trefynwy	88,855	66,117	154,972	
Special School				
Pupil referral unit	1,645,026	1,126,133	2,771,159	
Total	4,091,578	2,834,735	6,926,313	