
EDUCATION INVESTMENT STRATEGY CAERDYDD 2024 – 2033

Purpose of the Report

1. To provide Members with the opportunity to carry out pre-decision scrutiny of proposals, attached at **Appendix A**, prior to its consideration by Cabinet at its meeting on the 16 May 2024.
2. This report also sets out the views and observations of the SOP Task & Finish Group, which met the Cabinet Member and officers on the 24 April 2024 to discuss the vision and purpose of the Investment Strategy, which will aid Members in their consideration of this issue. See paragraphs 20 – 24 of this report for more details.

Structure of Papers

3. Attached to this report are the following:
 - **Appendix A** – the draft Report to Cabinet – 16 May 2024. This in turn has a number of appendices, namely;
 - **Appendix 1:** Annual Report on investment in the Education estate
 - **Appendix 2:** Summary population and places data sets January 2024
 - **Appendix 3:** Education Investment Strategy Caerdydd 2024 – 2033.
 - **Appendix 4:** Cardiff's Sustainable Communities for Learning Rolling Programme 2024-2033
 - **Appendix 5:** Single Impact Assessment

There are also a number of Background papers referred to in the Cabinet Report and these can be found via the following links:

- [Stronger, Fairer, Greener - Cardiff Council 2022 \)](#)
- [Cardiff 2030 Strategy](#)
- [Sustainable Communities for Learning Programme | GOV.WALES](#)

Reason(s) for the Cabinet Report (Appendix A onwards)

4. The purpose of the Cabinet report is to:

- Outline the progress of Cardiff's Sustainable Communities for Learning programme.
- Seek Cabinet approval of the new 'Education Investment Strategy Caerdydd 2024 - 2033'.
- Seek Cabinet approval of 'Cardiff's Sustainable Communities for Learning Rolling Programme 2024-2033' to allow a business case for the rolling programme to be formally submitted to Welsh Government for approval by the Minister.
- Note that individual proposals under 'Cardiff's Sustainable Communities for Learning Rolling Programme 2024 - 2033' will be subject to further individual business cases.
- Note that the Cathays High School project will no longer be delivered through the Mutual Investment Model but will instead form a capital project in the rolling programme.

Background to the Cabinet Proposal

The Cardiff Context - 'Stronger, Fairer, Greener' and the importance of investing in Education

5. The Council's 'Stronger, Fairer, Greener' policy statement makes clear the administration's commitment to Cardiff being a great place to grow up, with continuing to improve the city's educational system central to the delivery of this commitment.

6. The Council recognises that Cardiff has made significant progress in terms of the number of schools that offer high quality educational experiences to their pupils as evidenced by improving educational outcomes and Estyn reports.
7. Investment in, and improving Cardiff's education estate, to ensure that there are more appropriate, high quality school places for young people, will be vital to continuing this improvement journey and to meeting the needs of Cardiff's growing and changing population.
8. Through Cardiff's existing education investment, in partnership with Welsh Government's Communities for Learning Programme, the Council has invested over £460m into the school estate, including:
 - School investment that has ensured sufficiency of secondary places through the peak intakes.
 - The replacement of condition D buildings (or replacements commissioned/ in delivery).
 - An increased number of both Welsh-medium and English-medium specialist ALN places have been delivered through expansion of several special schools and establishing a greater number of specialist resource bases.
 - New primary provisions developed to serve new residential areas delivered through the Local Development Plan (LDP).
 - The development of a new dual language model, now operating on one of the first LDP sites.
9. This development has been made possible through securing, combining and prioritising funding from a variety of sources, including: Welsh Government's Sustainable Communities for Learning Investment Programme and other Welsh Government Capital Grants; funding from the Council's capital programme; Salix funding for carbon reduction schemes; and Local Development Plan contributions to develop school places to serve new residential communities.

Continued investment in Cardiff's schools

10. The Sustainable Communities for Learning Programme, formerly the 21st Century Schools Programme, is a collaboration between the Welsh Government and Local Authorities. This major, long-term and strategic capital investment programme aims to create a generation of excellent zero carbon learning facilities at the heart of their communities.

11. In Cardiff, the Band B investment phase of this programme is ongoing with a range of projects progressing with a total committed spend to date at circa £257m (excluding Net Zero Carbon). This follows on from an investment of £164m in Cardiff's schools in the Band A phase. The Annual Report on investment in the Education estate (attached at Appendix 1) sets out this progress in detail.

12. Each of the three schools classified as "D" for condition (where all or part of the buildings are identified as 'end of life') at the beginning of the Band B programme, namely Cantonian High School, Fitzalan High School and Willows High School are being replaced as part of the Band B Programme. The approved new-build projects in the Band B programme, and in construction on LDP strategic sites, will remove eight "C" or "D" condition buildings and will deliver eleven new "A" condition buildings.

13. In addition to this, in recent years, the Council has also increased investment in its education estate through its Asset Renewal Programme, to £13.1m in 2020/21, £18.6m in 2021/22 and £29.0m 2022/23. As a result, clear progress has been made to address historical maintenance and condition issues of the estate, and in 2023/24:
 - the proportion of Condition A schools increased from 6% to 9%
 - the proportion of Condition B schools increased from 30% to 39%
 - the proportion of Condition C schools decreased from 61% to 50%.
 - the proportion of Condition D schools is unchanged at 2%.

14. The below table shows the Property Condition classification of all Cardiff schools as at September 2023.

Property Condition	2020	%	2021	%	2023	%
A	3	2%	8	6%	11	9%
B	37	29%	38	30%	50	39%
C	84	66%	78	61%	65	50%
D	3	2%	3	2%	3	2%
Total	127		127		129	

Further Information Highlighted in the Cabinet Report

15. The Cabinet Report attached at **Appendix A** is set out as follows:

- Issues - from Paragraph 12, including:
 - Mainstream pupil population changes - paragraphs 13 – 20
 - Provision for pupils with Additional Learning Needs – paragraphs 21 – 25
 - Effectiveness, efficiency and condition of the Education Estate – paragraphs 26 - 28
- Education Investment Strategy and the Sustainable Communities Programme 2024-33 - paragraph 29, plus Appendices 3 and 4
- Education Investment Strategy Caerdydd 2024 – 2033 – paragraphs 30 – 40 (*includes strategy consultation information*)
- Cardiff's Sustainable Communities for Learning Rolling Programme 2024-2033 – paragraphs 41 – 47
- Rolling programme considerations – paragraphs 48 - 54
- Local Member Consultation – paragraph 55

16. The draft Cabinet report also provides details on the following areas:

- Impact of the proposals on the Welsh Language – paragraphs 58 - 61
- Wellbeing of Future Generations – paragraphs 62 - 64
- Financial Implications – paragraphs 65 - 68
- Legal Implications – paragraphs 69 - 74
- Human Resources Implications – paragraphs 75 - 77
- Property Implications - paragraph 78
- Traffic and Transport Implications – paragraphs 79 - 88
- Impact Assessment – paragraphs 89 - 90 and *Appendix 5 to the Cabinet Report*

Reason for Recommendations

17. To approve Education Investment Strategy Caerdydd 2024 - 2033.

18. To approve the schemes that have been prioritised for investment under Cardiff's Sustainable Communities for Learning Rolling Programme 2024-2033.

Recommendations set out in the Cabinet Proposals

19. The Cabinet is recommended to:

- (i) Note the content of the Annual Report setting out progress and successes over the past 12 months of Cardiff's Sustainable Communities for Learning programme.
- (ii) Adopt 'Education Investment Strategy Caerdydd 2024 – 2033'.
- (iii) Approve the schemes that have been prioritised for investment under 'Cardiff's Sustainable Communities for Learning Rolling Programme 2024-2033' to allow a programme business case to be formally submitted to Welsh Government for approval by the Minister.
- (iv) Note that individual proposals under 'Cardiff's Sustainable Communities for Learning Rolling Programme 2024-2033' will be subject to appropriate business cases and are at this stage indicative.

- (v) Note that the Cathays High School project will no longer be delivered through the Mutual Investment Model but will instead form a capital project in the rolling programme.
- (vi) Delegate responsibility to the Director of Education and Lifelong Learning for the development and implementation of operational plans to deliver the success measures set out in the strategy.

School Organisation Planning Task & Finish Group

20. The SOP Task & Finish Group met with the Cabinet Member and SOP Officers on the 24th of April 2024. At this meeting, they received a presentation on the draft Education Investment Strategy proposals. The purpose of the meeting was for Members and officers to consider the content and make views and observations ahead of this meeting of the Children & Young People Scrutiny Committee.

Issues considered at the meeting:

21. SOP T&F Members received a presentation on the following areas:

- Education Investment Caerdydd 2024 – 2033
 - a) Strategy context
 - b) What the strategy is for
 - c) Case for change
 - d) Stakeholder feedback
 - e) Vision, principles and strategic aims
- Sustainable Communities for Learning Rolling Programme 2024-2033

22. At this meeting, the draft Strategy document was not available, but some of the issues raised at this meeting could inform the final draft.

Further Issues discussed:

23. Arising from the presentation, the SOP Task & Finish Group further discussed the following:

- Whether the Strategy and rolling programme contained details of individual proposals. Whilst the SOP Team were able to outline some proposals, it was agreed that the Strategy document sets out the context, vision, principles etc, and the detail of individual proposals will be submitted to the SOP Group and/or full committee when they emerge.
- Members asked whether the Strategy and rolling programme were flexible and able to bring other projects on board during the lifetime of the Strategy, for example in relation to the release of sites, and were pleased to hear that the new Strategy would be more flexible going forward.
- Members discussed what was planned in terms of surplus places and how this would be managed. It was responded that the utilisation of the federation and collaboration approach could assist in this area, but this could be explored further at full committee.
- Members also considered the impact of increased demand in relation to additional learning needs and whether the Strategy and rolling programme factored in the need for more SRBs and places in the future. Linked to this, the use and costs of school transport relating to ALN. Members felt that full committee should be informed on how this will be resourced, communicated, with a cohesive joined-up approach.

Way Forward/ Proposals to take to the formal CYPSC Meeting on the 14th May 2024

24. Members of the SOP Task & Finish Group recommend that the following approach be communicated to CYPSC Members, Cabinet Member and officers prior to the CYPSC meeting on the 14th May:

- That the Strategy document and rolling programme sets out the context, vision, principles and approach to school organisation planning for the next 9 years. These documents may not currently contain the

level of detail on individual proposals that Members may wish to have in front of them at this stage.

- Members are requested to consider the approach to school organisation planning as set out in the Strategy and whether they agree with this approach.
- The rolling programme will be a “live” document, and Members may wish to receive updated information should any further major changes be made in the future.
- Members will receive detailed information on individual proposals arising from the Strategy and rolling programme, as they have done to date; and will have the opportunity to undertake detailed scrutiny of these proposals in due course.
- Members may wish to consider further, the following issues that were raised at this meeting, namely:
 - The efficiency, flexibility and effectiveness of the Strategy and the systems and processes that will support it.
 - Planning and Management of Surplus Places
 - The role of federation and collaboration going forward (following on from the discussion at February’s meeting of CYPSC)
 - ALN and School Transport issues including the extent to which resourcing and staffing of current and future SRBs will be maintained
 - The extent to which the funding identified in the presentation is guaranteed
 - The nature of any risks to implementation of any elements of the programme
- Members also suggested that the term “Super School” be avoided as it risks creating the impression of a hierarchy of schools.

Scope of Scrutiny

25. The scope of this scrutiny is for Members to consider and provide comments on the draft report to Cabinet, prior to its consideration of the report on the 16 May 2024.

Way Forward

26. At this meeting, the following have been invited to attend. There will be a verbal introduction given at the beginning of the Item, with a Q&A session afterwards.

- Councillor Sarah Merry (Deputy Leader of the Council and Cabinet Member for Education)
- Melanie Godfrey (Director of Education & Lifelong Learning)
- Richard Portas (Programme Director for the School Organisation Programme)
- Michele Duddridge-Friedl (Operational Manager, School Organisation Programme Strategy)
- Brett Andrewartha (School Organisation Programme Planning Manager)
- Jennie Hughes (Head of Inclusion, Education & Lifelong Learning)

27. This report will enable Members to provide any comments, concerns or recommendations to the Cabinet Member prior to its consideration by Cabinet.

Legal Implications

28. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal

powers of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. Scrutiny Procedure Rules; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

Financial Implications

29. There are no direct financial implications arising from this report. However, financial implications may arise if and when the matters under review are implemented with or without any modifications.

RECOMMENDATIONS

The Committee is recommended to:

1. Review and assess the information contained in the draft Cabinet Report and its appendices, attached at **Appendix A**, together with any information provided at the meeting;
2. Provide any recommendations, comments or advice to the Cabinet Member and senior officers prior to the report's consideration by Cabinet.

Leanne Weston
Interim Deputy Monitoring Officer
8 May 2024