

Local authority support for school budgets

1. Questionnaire for local authorities

1. About the local authority

1. Which local authority do you work for?

- Blaenau Gwent
- Bridgend
- Caerphilly
- Cardiff
- Carmarthenshire
- Ceredigion
- Conwy
- Denbighshire
- Flintshire
- Gwynedd
- Isle of Anglesey
- Merthyr Tydfil
- Monmouthshire
- Neath Port Talbot
- Newport

- Pembrokeshire
- Powys
- Rhondda Cynon Taf
- Swansea
- Torfaen
- Vale of Glamorgan
- Wrexham

2. Your name and role:

3. Your contact email:

4. What is the number of maintained schools supported by the local authority (by phase)?

2. Strategic financial advice and communication

**5. What core financial guidance does your LA provide to schools each year?
(briefly outline content, frequency, and format)**



3. Strategic financial advice and communication

6. How and when are delegated budgets initially communicated with schools and how are changes to delegated budgets communicated to schools?

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4. Strategic financial advice and communication

7. Do you issue financial planning timelines or templates?

Yes

No

5. Budget setting and transparency

8. How is your funding formula developed, reviewed, and consulted on?

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6. Budget setting and transparency

9. Do you publish formulae or budget calculations for schools to review?

Yes

No

7. Budget setting and transparency

10. How do you involve schools in collaborative budget planning (e.g. schools forums, clusters)?

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8. Training and financial literacy

11. What training is currently offered to: Headteachers, Business Managers, Governors?

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9. Training and financial literacy

12. How frequently is training offered?

10. Training and financial literacy

13. How do you evaluate the impact or uptake of training? (share any support materials/examples)

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11. Training and financial literacy

14. Are new leaders/schools in deficit prioritised for additional support?

Yes

No

What does this support look like? Tell us more:

12. Monitoring, risk and intervention

15. How often are school budgets reviewed centrally?

Termly

Quarterly

Annually

Other (please specify):

13. Monitoring, risk and intervention

16. What is your protocol for deficit recovery planning? (attach if available)

14. Monitoring, risk and intervention

17. How do you assess the impact of interventions?



15. Use of targeted grants

18. How do you support schools in planning the use of various grant funding?



16. Use of targeted grants

19. How do you monitor how well schools are using grant funding strategically? E.g. do you require schools to report on outcomes of targeted spending?

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17. Promoting equity and sustainability

20. How is equity built into your allocation model (e.g. rurality, free school meals, small schools, language)?



18. Promoting equity and sustainability

21. Do you have a long-term financial risk model or sustainability plan for schools?

Yes

No

Tell us more: