

Cynulliad Cenedlaethol Cymru | National Assembly for Wales

Y Pwyllgor Plant, Pobl Ifanc ac Addysg | Children, Young People and Education Committee

Cyllido Ysgolion yng Nghymru | School Funding in Wales

SF 12

Ymateb gan: Cyngor Sir Powys

Response from: Powys County Council

Thank you for your letter dated 25th October 2018 requesting information on the way in which Powys County Council sufficiently distributes funds to schools on an annual basis to ensure the delivery of Welsh Government's policy objectives.

Powys County Council follow the Welsh Government guidelines in using a formula to distribute funds fairly from the Council budget to individual schools, via either a per pupil amount and a lump sum, in certain circumstances, or via specific weightings within a formula. For transparency, attached are the formula calculations for both the Secondary (Annex A) and Primary (Annex B) Schools for the financial year 2018.

For Financial Year 2017-2018 the following amounts and %s reflect the breakdown of the Schools Service budget within the Council:

	Total in £m	% of Total Budget
Non-Schools Education Budget (Service Budget)	15.5m	14.35%
The Schools Budget	12m	11.11%
Individual Schools Budget (Delegated Funds)	80.5m	74.53%

The formula used by the Council is attached at Annex A (Secondary Schools) and Annex B (Primary Schools). The Council has been reviewing its current funding formula and has recently completed a consultation period. We have involved stakeholders from all sectors across the County, including Headteachers from Primary, Secondary and Special Schools, as well as Governors, union reps and officers. The approach has been to create a new simpler to administer formula for all schools to understand and be in a position whereby they will be able to calculate their own funding and therefore forecast more accurately. This funding formula is due to roll out in April 2019.

If you require any further information please do not hesitate to contact Richard Waggett (Finance Manager - Schools) on 01597 826387 or Richard.waggett@powys.gov.uk

Annex A

Analysis of Powys School Fair Funding Formula 2017/18

Overview

Pupil Numbers

Pupil numbers are based on PLASC data (changed to Friday after October half term counting date for 2018/19 year)

Secondary Schools

Secondary schools numbers are based on actual pupil roll as at PLASC Counting Date for each of year 7 and year 10. The numbers on roll in year 7 are used for funding each of years 8 and 9. Similarly the pupil number in year 10 is also used to ensure the same level of consistency within the school.

Secondary

Listed below is the method used to allocate funding to all schools:

Age Weighted KS3 (years 7-9)	The formula allows for separate ratios and Average Teacher Costs (ATCs)
Age Weighted KS4 (years 10-11)	There is both funding per teacher and funding per pupil. The funding per teacher is based on UPS1 with on costs plus 17.1% uplift for Planning, Preparation & Assessment (PPA). The funding per pupil is the funding per teacher multiplied by the pupil teacher ratio.
Small School KS3	This element compares individual years to ensure funding for a minimum number of classes. In KS3 75% at a minimum of 2 classes 25% at a minimum of 3 classes
Small School KS4	 In KS4 50% at a minimum of 2 classes 25% at a minimum of 4 classes 25% at a minimum of 5 classes

	These are then multiplied by the funding per teacher.
Language Choice	<p>Allows for a maximum of 0.50 FTE teachers to deliver classes in the medium of English or Welsh per year group.</p> <p>The data for the percentage of the classes delivered in both streams is provided by Schools Service via data provided by schools.</p> <p>The formula adds up both KS3 and KS4 before multiplying them by 50% of the funding per teacher.</p>
Lump Sum	A lump sum of funding depending on the classification of the school. The lump sum is based on the funding per teacher.
Other Pupil Led	Actual rate used is £37 per pupil.
Other Curriculum	
Admin	Admin and Techs are both funded based on the number of FTE teachers funded. The main difference is that Admin are funded 26 hours plus 4.75 hours per FTE teacher while Techs are funded 45 hours plus 2.60 hours per FTE teacher.
Techs	
MDS	All pupils (KS3, KS4 and Post 16) are funded in a 1:150 ratio at £1,364.88 each
Exam Fees	A sum per Year 11 per pupil multiplied by 12 subjects. Funding Updated to reflect actual costs for average Year 11 learner (10 @ £31 + 2BTEC's @ £85 =£480)
Capitation	A sum per KS3 and KS4 pupil of £60
LMS SEN	Total funding is split 50:50 between FSM pupils (average over 3 years) and KS3 & KS4 pupils and then apportioned over each.
TLRs	A sum per every KS3 and KS4 teacher funded
Management Costs	This element looks to fund the 80% of the difference between UPS1 and the schools leadership structure. While the pay points are defined by management, the number of posts is dependent on the number of teachers employed.
Property	
The majority of the property funding is based on the concept of a predefined pool of funding which is then apportioned over the appropriate schools. The apportionment is divided between pupil numbers (25%) and weighted floor (or grounds) area in square meters (m ²) (75%).	

The weighting has been based on information provided by the Property Management Team.

R & M Funding	<p>Repairs and Maintenance - that the current funding should continue to be allocated on the basis of 25% pupil numbers / 75% premises related factors but the condition weighting elements within the premises related factors should be simplified into one figure multiplied by the floor area</p> <p>The recharges also include figures for property and employee insurance.</p> <p>The property funding is split between pre and post 16 based on pupil numbers.</p>
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Other Property Funding	Made up of the following indented headings
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<ul style="list-style-type: none"> Energy 	<p>Energy Allowance - that the current split in funding between pupil numbers (25%) and premises related factors (75%) should be maintained but within the premises related factors, the funding should be split 20% electricity consumption/10% kitchen energy consumption/70% heating consumption and linked to the type of energy used and the cost per kWh, to better reflect actual costs, as follows:</p> <p>Weightings for energy costs (heating)</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th style="text-align: center;">Per kWh</th> <th style="text-align: center;">Proposed</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">weighting</td> <td></td> <td></td> </tr> <tr> <td>Electricity</td> <td style="text-align: center;">£11.028</td> <td style="text-align: center;">4.60</td> </tr> <tr> <td>Natural Gas</td> <td style="text-align: center;">£3.651</td> <td style="text-align: center;">1.50</td> </tr> <tr> <td>LPG</td> <td style="text-align: center;">£2.40</td> <td style="text-align: center;">1.00</td> </tr> <tr> <td>Oil</td> <td style="text-align: center;">£3.01</td> <td style="text-align: center;">1.25</td> </tr> <tr> <td>Biomass (RHI)</td> <td style="text-align: center;">N/A</td> <td style="text-align: center;">1.00</td> </tr> <tr> <td>Biomass (non RHI)</td> <td style="text-align: center;">£4.549</td> <td style="text-align: center;">1.90</td> </tr> </tbody> </table> <p>Condition Factor Weightings for heating (floor area)</p>		Per kWh	Proposed	weighting			Electricity	£11.028	4.60	Natural Gas	£3.651	1.50	LPG	£2.40	1.00	Oil	£3.01	1.25	Biomass (RHI)	N/A	1.00	Biomass (non RHI)	£4.549	1.90
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	<p>Condition A 1.00</p> <p>Condition B 1.10</p> <p>Condition C 1.20</p> <p>Condition D 1.30</p> <p>Weightings for kitchen</p> <p>Standalone kitchen 1.00</p> <p>Import kitchen 0.25</p> <p>Export kitchen 1.25</p>
• Cleaning	25% Pupil Numbers / 75% Weighted Floor Area
• Grounds	Based on grounds area rather than floor area. There is also an additional 1.10 multiplier only for schools that have large trees.
• Rates	The school is funded the exact charge it is levied.
• Statutory Testing	This is a direct allocation based on the recharge amount as provided by Property Management.
Dryside & Hall	<p>This funding is to allow schools who don't own a hall to arrange bookings with external providers such as a community hall or leisure centre.</p> <p>The funding method takes the total funding for premises, energy and cleaning and divides them by their respective total weighted floor areas to derive an average funding per square meter. This is multiplied by the nearest hall size (usually directly next to the school) plus an additional 10% for storage. There is no pupil led funding in this.</p>
No Hall/Grass	Similar to dryside except this is for schools without playing fields.
Catering Equipment	<p>It keeps the kitchen stocked in pans, plates etc.</p> <p>This funding is split in to two parts, a base allocation and funding per pupil.</p> <p>The concept here is that every school will need plates and cutlery but only schools with active kitchens will need funding for equipment and those serving multiple schools will need more equipment/more replacements.</p>

Split Site Allowance	<p><i>There are two lump sums:</i></p> <p>0.25 FTE for schools within 20 minutes</p> <p>0.50 FTE more than 20 minutes away.</p>
Post 16 (years 12 to 13)	This part of the formula is calculated on classes with an element of £390 per pupil.
Free School Meals	Estimated allowances for the cost of providing Free School Meals. If the actual cost is greater or smaller than this allowance then the funding is adjusted accordingly.
Social Inclusion	Lump sums provided per school.
2016/17 Transition Year 2	Transitional amounts from changes made to the 2016/17 funding formula.

Annex B

Analysis of Powys School Fair Funding Formula 2017/18

Overview

Pupil Numbers

Pupil numbers are based on PLASC data (changing to Friday after October Half term counting date for 2018/19)

Primary Schools

Primary numbers are based on actual numbers included in the PLASC. For clarity, funding is offered for all year R, 1,2,3,4,5 and 6 children, post change of admission September 2017.

Nursery children are funded on the assumption that all nursery children enter full time education at the establishment they are in nursery. Those that turn 4 in the autumn of the year preceding 1 January and those turning 4 in the spring term are entitled to funding through the PRAF. To ensure schools are not disadvantaged when calculating the nursery calculation a calculation representing potential summer term admissions is calculated based on 7/4 of the autumn number to ensure all children are accounted for.

Primary

Listed below is the method used to allocate funding to all schools:

Heading	Methodology
Teacher Funding	$\frac{\text{Pupils Funded}}{\text{Teacher Ratio}} \times \text{Sector ATC}$ <p>Pupils Funded: See above</p> <p>Teacher Ratio: Currently set to 28.1 pupils to 1 teacher</p> <p>Sector Average Teacher Cost: £51,370</p>
Lump Sum / Dual Stream Uplift	<p><u>Lump sum</u></p> <p>Sector Average Teacher cost x FTE Allocation The lump sum has two possible values; 0.60 FTE for 1-100 pupils or 0.65 FTE for 101+ pupils for Single Stream, 1.20 FTE for 1-100 pupils or 1.15 FTE for 101+ pupils for Dual Stream. All at the sector ATC.</p> <p>Dual Stream Uplift</p> <p>Sector Average Teacher cost x FTE Allocation Only applied to Dual Stream Schools to fund the additional cost of managing two language streams. The funding itself is similar to the lump sum in that 1-100</p>

	pupils are funded 0.60 FTE while 101 pupils are only funded 0.50 FTE.
Small Schools Allowance	<p>Sector Average Teacher cost x (Teacher + Lump Sum - Minimum)</p> <p>This element looks to ensure a minimum number of FTE based on the total funded by Teacher Funding and Lump Sum. For 1-30 pupils this is 1.80 FTE but for 31 or more pupils it is 2.30 FTE. <i>As an example if pupils were 25 then the funded FTE would be 1.65. Therefore the Small Schools Allowance would be 0.15 FTE to make the total 1.80 FTE</i></p>
Welsh KS2 Support	<p>Welsh Medium KS2 Pupils x Units (£56 per Welsh medium KS2.)</p> <p>Only provided to schools with Welsh pupils to fund Teaching Assistants (TAs) or Learning Support Assistants (LSAs) in Key Stage 2 (KS2).</p>
Total Allocation Subject to Transition	Sum of the above
2016/17 Net Transition Year 2	<p>For the 2016-17 financial year, no transitional arrangements be put in place for primary schools that gain or lose £2,000 or less and secondary schools that gain or lose £10,000 or less. For the remainder of the gain or loss, protection of budget/reduction of budget is given at the following percentages for the next three financial years:</p> <p>2017-18 75% 2018-19 50% 2019-20 25%</p> <p>The protection/reduction levels will be cash levels set at the start of the 2016-17 financial year for the 3 year period and will not be subject to adjustment through changes in pupil numbers, etc. The final year of transition from the 2015-16 transition arrangements are included in the base calculation and included in a single Transition Allowance.</p>
Total Allocation of Transition	Sum of the above
Split Site Allowance	<p>Two schools benefit from this, Ysgol Bro Hyddgen and Newtown.</p> <p><i>There are two lump sums:</i> 0.25 FTE for schools within 20 minutes 0.50 FTE more than 20 minutes away</p>

R & M Funding	Repairs and Maintenance - that the current funding should continue to be allocated on the basis of 25% pupil numbers / 75% premises related factors but the condition weighting elements within the premises related factors should be simplified into one figure multiplied by the floor area																																						
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Total Property	Sum of the above
HR	Schools are funded for the enhanced service level and can opt into the different levels of service provided via the SLA's in place
Employment Services	
Finance	
BPU ICT	
BPU Invoices	
Total Core Package	Sum of the above
SEN Allowance	<p>SEN allowance is split over 2 different areas</p> <ul style="list-style-type: none"> • 50% Free school Meal numbers averaged over 3 years • 50% Pupil numbers reception to Year 11
Educational Costs / Welsh Resources	<p>This element funds the 'capitation' in schools i.e. books, pens, craft equipment etc.</p> <p>Lump Sum + (Welsh Medium Pupils x Units) (Lump Sum = £2,500. Units = £30)</p> <p>Only provided to schools with Welsh pupils to fund the additional cost of sourcing educational resources in Welsh and/or translating English resources in to the medium of Welsh.</p> <p>There is a lump sum plus an additional sum per Welsh</p>

	pupil allocated.
Average Teacher Cost Adjustment	<p>This is the difference between funding schools at the sector ATC and the schools ATC multiplied by the number of teachers.</p> <p>e.g. if sector ATC was £30,000 and school ATC was £35,000 with 4.00 FTE teachers then they would receive 4.00 x (£35,000-£30,000) = £20k</p>
Admin Allowance	<p>Flat rate per school of £1755 clerical</p> <p>Lump sum of £1,280 per school for the clerking of governors.</p>
Workload	<p>This is a lump sum based on the number of teachers funded. This calculation is different from others however as it only includes the following and is rounded to the nearest 0.50 FTE.</p> <ul style="list-style-type: none"> • Teachers • Lump sum • Small school allowance • Dual stream uplift • Class size
Foundation Phase	<p>The Authority receives an allocation of funding from EIG grant in respect of the Foundation Phase. This grant has been increased by the funding previously made available through the NTA allowance. The first 8 pupils in the early years and key stage 1 are funded at the current NTA allowance funding level (£245 per pupil).</p> <ul style="list-style-type: none"> • The balance excluding £50,000 should be allocated equally across all remaining early years and key stage 1 pupils. The remaining £50,000 to be allocated to ensure all schools with 16 or more early years and KS1 pupils receive a minimum allocation of £12,500 per annum.
Breakfast Clubs	<p>The basis of funding and provision of Breakfast Clubs has been adjusted, as follows:</p> <ol style="list-style-type: none"> 1. Settings with less than 30 pupils will receive funding for 2 members of staff and those with 30 or more pupils will receive funding for 3 members of staff 2. A charge of £1 per day will be applied for each child attending to reflect the time provided above 30 mins (not applied to children eligible for Free School Meals) 3. Only Breakfast Clubs with more than 15 children attending will be funded.

	To support planning at school level the changes in funding will be implemented from 1 st September 2016 rather than 1 st April 2016.
Total Other	Sum of the above
Total Delegated Funding	Sum of the above
Less efficiencies	Efficiencies are treated as a proportionate pro rata reduction from the overall schools budget .
Total Delegated Funding	