



Cyngor **Abertawe**  
**Swansea** Council

## **Education Budget Statement 2024/25**

**Section 52 of the School Standards and Framework Act 1998**

**Mae'r ddogfen hefyd ar gael yn Gymraeg  
This document is also available in Welsh**



## **LA Annual Budget Statement 2024/2025**

Local Authorities (LAs) are required, under Section 52 of the School Standards and Framework Act 1998, to prepare a Budget Statement each financial year.

The format of the Budget Statement is specified in the Education (Budget Statements) (Wales) Regulations 2002. Every Budget Statement must be prepared in three parts as follows:

- Part 1** containing particulars of planned expenditure for individual schools
- Part 2** information with respect to the methodology for determining schools' budget shares
- Part 3** information with respect to the budget share of each of the authority's schools

A copy of the Budget Statement must be supplied to the governing body and headteacher of each maintained school in the Authority and also made available for reference to parents and other persons at all reasonable times and without charge.

*Michelle Thomas  
Head of Funding and Information Team  
Education Department  
Guild Hall  
Swansea*

*Tel: 01792 636686*

*Michelle Thomas@swansea.gov.uk*

S52 EDUCATION BUDGET STATEMENT

Year: 2024-25

LEA Name: City and County of Swansea

LEA Code: 670

UA Code: 532

(1) School name	(2) Official reference number	(3) School opening/closing O/C	(4) Date opening/closing	(5) Number of pupils	(6) Budget share		(8) Notional S.E.N. budget £k	(9) Non-ISB Funds devolved to schools £k
					Per school £k	Per pupil £		

Primary schools

Birchgrove Primary	2236			412	1,692	4,111	174	
Bishopston Primary School	2105			276	1,353	4,910	312	
Blaenymaes Primary School	2082			199	1,103	5,543	187	
Brynhafod Primary School	2247			445	1,874	4,217	224	
Brynmill School	2006			312	1,363	4,368	123	
Burlais Primary School	2243			459	2,298	5,012	579	
Cadle Primary School	2008			290	1,544	5,334	339	
Casllwchr Primary School	2108			193	894	4,634	80	
Christchurch Church In Wales	3306			154	767	4,982	88	
Cila Primary School	2109			106	591	5,573	44	
Clase Primary School	2073			328	2,032	6,196	739	
Clwyd Primary School	2069			358	2,263	6,329	914	
Clydach Primary School	2244			168	887	5,280	97	
Craigfelen Primary School	2215			181	970	5,374	159	
Crwys Primary School	2120			128	788	6,178	184	
Cwmglas Primary School	2077			239	1,275	5,337	266	
Cwmrhydyceirw Primary School	2014			507	2,014	3,976	222	
Danygraig Primary School	2017			236	1,304	5,525	336	
Dunvant Primary School	2237			322	1,543	4,791	346	
Gendros Primary School	2021			282	1,262	4,473	155	
Glais Primary School	2023			104	571	5,515	42	
Glyncollen Primary School	2226			180	875	4,875	91	
Gors Community School	2233			300	1,467	4,889	188	
Gorseinon Primary School	2246			276	1,281	4,641	143	
Gowerton Primary School	2240			339	1,417	4,187	130	
Grange Primary School	2027			127	854	6,748	227	
Gwyrsoydd Primary School	2238			384	2,041	5,321	589	
Hafod Primary School	2032			218	1,110	5,103	161	
Hendrefoilan Primary	2096			216	951	4,402	90	
Knelston Primary	2217			87	455	5,233	41	
Llangyfelach Primary School	2157			222	946	4,262	68	
Llanrhidian Primary	2159			147	719	4,891	54	
Mayals Primary	2076			222	983	4,439	104	
Morrison Primary School	2040			188	1,327	7,057	531	
Newton Primary School	2092			200	879	4,394	66	
Oystermouth Primary School	2042			212	953	4,507	100	
Parkland Primary School	2086			569	2,343	4,122	389	
Pen-Y-Fro	2219			188	877	4,679	103	

**S52 EDUCATION BUDGET STATEMENT**

Year: 2024-25

LEA Name: City and County of Swansea

LEA Code: 670

UA Code: 532

(1) School name	(2) Official reference number	(3) School opening/closing O/C	(4) Date opening/closing	(5) Number of pupils	(6) Budget share		(8) Notional S.E.N. budget £k	(9) Non-ISB Funds devolved to schools £k
					Per school £k	Per pupil £		

**Primary schools**

Penclawdd Primary School	2167			131	730	5,591	75	
Pengelli Primary	2172			120	622	5,207	41	
Penllergaer Primary School	2174			333	1,623	4,875	390	
Pennard Primary	2216			161	805	4,999	81	
Pentrechwyth Primary School	2048			131	769	5,896	117	
Pentre'r Graig Primary School	2241			289	1,291	4,476	126	
Penyrheol Primary School	2176			197	992	5,036	118	
Plasmarl Primary School	2051			205	1,077	5,266	158	
Pontarddulais Primary School	2186			387	1,622	4,197	169	
Pontlliw Primary	2192			202	943	4,668	124	
Pontybrenin Primary School	2223			310	1,277	4,125	130	
Portmead Primary School	2075			213	1,311	6,155	405	
Sea View Primary School	2234			216	1,147	5,311	176	
Sketty Primary School	2054			446	1,749	3,921	156	
St. David's Rc Primary School	3303			196	902	4,602	73	
St Helen's Primary School	2055			230	1,094	4,755	128	
St Illtyds Primary	3305			193	915	4,741	92	
St Josephs Cathedral Primary School	3309			467	1,926	4,129	199	
St Joseph's R.C. Primary	3308			209	916	4,391	89	
St Thomas Community Primary School	2239			412	1,820	4,423	226	
Talycopa Primary School	2225			199	922	4,632	92	
Terrace Road Primary School	2059			314	1,437	4,576	163	
Townhill Primary School	2063			448	2,222	4,960	507	
Trallwn Primary School	2084			215	1,319	6,148	414	
Tre Uchaf Primary School	2211			198	1,243	6,294	428	
Waun Wen School	2067			211	1,052	4,996	135	
Wauarwydd Primary School	2065			231	1,064	4,617	122	
Whitestone Primary	2095			130	951	7,316	340	
Ynystawe Primary School	2071			187	859	4,594	72	
Y.G.G. Bryniago	2189			176	852	4,856	70	
Y.G.G. Brynymor	2098			267	1,113	4,175	85	
Ysgol Gymraeg y Cwm	2245			117	666	5,691	53	
Y.G.G. Gellionnen	2232			190	911	4,807	84	
Y.G.G. Llwynderw	2235			314	1,292	4,115	87	
Ysgol Gymraeg Lon Las	2036			455	1,795	3,949	132	
Y.G.G. Pontybrenin	2212			526	1,980	3,764	171	
Ysgol Gymraeg Tan-y-lan	2242			193	946	4,914	79	
Y.G.G. Tirdeunaw	2231			342	1,523	4,453	146	
Ysgol Gymraeg Y Login Fach	2229			209	925	4,426	69	

**(10) Totals/average primary schools**

<b>19,725</b>	<b>94,467</b>	<b>4,789</b>	<b>15,007</b>	<b>0</b>
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**S52 EDUCATION BUDGET STATEMENT**

Year: 2024-25

LEA Name: City and County of Swansea

LEA Code: 670

UA Code: 532

(1) School name	(2) Official reference number	(3) School opening/ closing O/C	(4) Date opening/ closing	(5) Number of pupils	(6) (7) Budget share		(8) Notional S.E.N. budget £k	(9) Non-ISB Funds devolved to schools £k
					Per school £k	Per pupil £		

**Secondary schools**

Birchgrove	4075			690	4,587	6,647	1,061	
Bishop Gore School	4044			1,321	7,603	5,756	905	
Bishop Vaughan School	4600			1,196	6,332	5,294	389	
Bishopston Comprehensive	4069			1,123	6,207	5,527	701	
Cefn Hengoed	4031			916	5,482	5,984	749	
Dylan Thomas Community School	4076			698	4,804	6,882	1,182	
Gowerton Comprehensive School	4063			1,151	6,531	5,674	765	
Morrison Comprehensive	4033			1,116	6,607	5,920	908	
Olchfa School	4032			1,845	9,720	5,269	600	
Pentrefafod School	4043			1,133	6,668	5,885	1,031	
Penyrheol Comprehensive School	4062			884	5,393	6,101	633	
Pontarddulais Comprehensive School	4072			867	5,000	5,767	584	
Ysgol Gyfun Gymraeg Bryn Tawe	4078			925	5,300	5,730	418	
Ysgol Gyfun Gwyr	4074			1,158	6,292	5,434	399	

**(11) Totals/average secondary schools**

<b>15,023</b>	<b>86,526</b>	<b>5,760</b>	<b>10,325</b>	<b>0</b>
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**S52 EDUCATION BUDGET STATEMENT**

Year: 2024-25

LEA Name: City and County of Swansea

LEA Code: 670

UA Code: 532

(1) School name	(2) Official reference number	(3) School opening/closing O/C	(4) Date opening/closing	(5) Number of places	(6) (7) Budget share		(8) Notional S.E.N. budget £k	(9) Non-ISB Funds devolved to schools £k
					Per school £k	Per pupil £		

**Special schools**

Ysgol Pen-y-Bryn	7000			195	4,924	25,252		
Ysgol Crug Glas	7008			55	2,120	38,542		

**(12) Totals/average special schools**

	<b>250</b>	<b>7,044</b>	<b>28,176</b>	<b>0</b>	<b>0</b>
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**(13) Totals for all schools**

	<b>34,998</b>	<b>188,037</b>	<b>5,373</b>	<b>25,332</b>	<b>0</b>
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**MEMORANDUM ITEMS**

**(14) UNALLOCATED ISB**

Nursery	
Primary	15,252
Middle	
Secondary	9,330
Special	-800
<b>Total</b>	<b>23,782</b>

**(15) NON ALLOCATED NON-ISB FUNDS**

Nursery	
Primary	
Middle	
Secondary	
Special	
<b>Total</b>	<b>0</b>

**(16) TOTAL ISB**

<b>211,819</b>
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S52 Education Budget Statement			Table 2: Funding Factors	
Year	LEA	Table Version No.	LEA No.	Completion Date
2024-2025	City & County of Swansea	1	670	25/03/2024

INDIVIDUAL SCHOOLS BUDGET - FUNDING FACTORS

PRIMARY AND SECONDARY SCHOOLS

Pupil-led Funding

Type and factor name	Range or Level	Unit Value £	Pupil/Place Numbers	Funds Allocated	% of Primary & Secondary Budgets
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AGE-WEIGHTED FUNDING

Mainstream

Nursery Class (fte)	£4,786	1,417.00	£6,781,130	
Reception	£3,838	2,443.00	£9,377,431	
Year 1	£3,523	2,555.00	£9,000,760	
Year 2	£3,523	2,482.00	£8,743,595	
Year 3	£3,523	2,608.00	£9,187,468	
Year 4	£3,523	2,631.00	£9,268,493	
Year 5	£3,523	2,645.00	£9,317,812	
Year 6	£3,523	2,638.00	£9,293,152	
Year 7	£4,584	2,824.00	£12,944,856	
Year 8	£4,583	2,806.00	£12,859,456	
Year 9	£4,584	2,653.00	£12,160,104	
Year 10	£4,609	2,644.00	£12,185,697	
Year 11	£4,817	2,771.00	£13,347,898	
Year 12	£0	0.00	£0	
Year 13	£0	0.00	£0	
	Primary	19,419.00	£70,969,841	
	Secondary	13,698.00	£63,498,012	
	Total	33,117.00	£134,467,852	74.29%

Type and factor name	Range or Level	Unit Value £	Pupil/Place Numbers	Funds Allocated	% of Primary & Secondary Budgets
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**SEN - Place-led Funding Treated as Pupil-led**

Primary	Band E	£12,635	243.00	£3,070,423	
	Band F	£16,023	92.08	£1,475,473	
	Band G	£24,153	28.00	£676,296	
Secondary	Band E	£13,758	197.50	£2,717,226	
	Band F	£16,232	90.08	£1,462,222	
	Band G	£24,343	14.00	£340,799	
	Primary		363.08	£5,222,192	
	Secondary		301.58	£4,520,247	
	Total		664.67	£9,742,439	5.38%

**SEN Funding - Pupil-led**

Range or Level	Funds Allocated	
Primary	£9,874,182	
Secondary	£5,830,757	
Total	£15,704,939	9.82%

**TOTAL OF FUNDING TREATED AS PUPIL-LED**

Primary	19,782.08	£86,066,215	91.11%
Secondary	13,999.58	£73,849,015	85.35%
Total	33,781.67	£159,915,230	88.35%



## Other Funding

Type and factor name	Unit Value £	Multiplier	Funds Allocated	% of Primary & Secondary Budgets
<b>Site Specific Factors</b>				
Premises lump sum - Primary	£5,000.00	77	£385,000	
Premises lump sum - Secondary	£10,000.00	14	£140,000	
Excess Area - Primary	£20.98	23,691	£497,030	
Excess Area - Secondary	£36.94	22,698	£838,476	
Swimming Pools - Primary		1	£11,522	
Swimming Pools - Secondary		4	£149,349	
Rates - Primary			£1,350,187	
Rates - Secondary			£1,245,210	
Split Site - Primary	£15,793	4	£66,332	
Split Site - Secondary	£15,793	1	£25,000	
		Primary	£2,310,071	
		Secondary	£2,398,035	
		Total	£4,708,106	
<b>School Specific Factors</b>				
Small School Capitation - Primary			£10,755	
Kitchen Fuel - Primary			£332,967	
Kitchen Fuel - Secondary			£388,135	
Salary Protection - Primary			£38,345	
Salary Protection - Secondary			£3,918	
Secondary Associate Staff Lump Sum	£123,429	14	£1,728,000	
SLAs - Primary			£5,507,152	
SLAs - Secondary			£1,528,351	
Falling Roll Protection - Secondary			£0	
Small School Clerical - Primary	£29,167	0.052	£1,517	
Small School Teaching Assistant -Primary	£26,241	7.629	£200,193	
		Primary	£6,090,928	
		Secondary	£3,648,404	
		Total	£9,739,332	
<b>TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS PRIOR TO Post-16 FUNDING</b>		Primary	£94,467,214	
		Secondary	£79,895,454	
		Total	£174,362,669	96.34%
<b>Post 16 Funding</b>				
Secondary mainstream			£6,630,770	3.66%
<b>TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS</b>		Primary	£94,467,214	
		Secondary	£86,526,225	
		Total	£180,993,439	100.00%

## SPECIAL SCHOOLS

Type and factor name	Range or Level	Unit Value £	Pupil/Place Numbers	Funds Allocated
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### Place-led Funding

Band E	£13,970	115.0	£1,606,601
Band G	£26,249	86.0	£2,257,390
Band H	£45,733	49	£2,240,895
Total		250	£6,104,886

### Pupil-led Funding

Nursery (fte)	£484.07	4.00	£1,936.30
Reception	£484.07	4.00	£1,936.30
Year 1	£484.07	7.00	£3,388.52
Year 2	£484.07	4.00	£1,936.30
Year 3	£484.07	8.00	£3,872.60
Year 4	£484.07	6.00	£2,904.45
Year 5	£484.07	6.00	£2,904.45
Year 6	£484.07	14.00	£6,777.05
Year 7	£590.60	21.00	£12,402.70
Year 8	£594.10	27.00	£16,040.60
Year 9	£581.88	18.00	£10,473.77
Year 10	£804.01	22.00	£17,688.14
Year 11	£819.14	23.00	£18,840.33
Year 12	£892.44	18.00	£16,063.87
Year 13	£982.20	23.00	£22,590.63
Year 14	£877.84	25.00	£21,945.93
Total		230	£161,702

### Site Specific Factors

Premises lump sum	£5,000	2	£10,000
Split Site			£16,583
Excess Area	£20.89	498.47	£10,413
Swimming Pool	£22,131	1	£22,131
Total			£59,127

Type and factor name	Unit Value £	Pupil/Place Numbers	Funds Allocated
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### School Specific Factors

Curriculum Protection	£79,180	2	£158,360
Small School Capitation			£0
Kitchen Fuel		2	£5,700
Transport		2	£3,811
Long Term Sickness			£96,702
Salary Protection			£0
SLAs			£198,731
Residential Costs	£254,864	1	£254,864

Total			£718,168
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<b>TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS</b>	£7,043,883
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<b>TOTAL FUNDS AVAILABLE TO ALL SCHOOLS</b>	£188,037,322
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## **Construction of School Budget Shares**

Note the following points:-

- The various elements are listed on the left hand side of the budget share
- All salaries include on-costs.

## PRIMARY BUDGET SHARE

### SCHOOL ELEMENT (Lines 1 - 4)

This is data about the school. It lists items which will be used in the actual calculation of the school's budget share. These must be checked by the school to ensure that the information to be used is correct.

<u>Line</u>	<u>Description</u>
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- |    |  |
|----|--|
| 1. | Gross floor area of the school buildings.  |
| 2. | Split Site Factor. Where a teaching class or dining hall is split from the main school building by a publicly maintained road. If the split area is a teaching class "1" is shown in this line. If the split area is a dining hall "0.5" is shown. |
| 3. | "1" in this line indicates that the school teaches through the medium of Welsh.  |
| 4. | This line shows the percentage of children entitled to receive free school meals as recorded on the PLASC return.  |

### PUPILS ELEMENT (Lines 5 - 16)

5. This gives the number of places in the Specialist Teaching Facility (STF), if the school has one, as approved by Council.
- 6–14. The number of pupils in each age group.  
The April mainstream numbers are as recorded on the PLASC return.  
Upon closure of a school the named receiving schools will have their pupil numbers protected for the first academic year.
15. This gives the total number of pupils in the school (Full time equivalent).

### TEACHING ELEMENT (Lines 16 - 20)

16. Headteacher and Deputy Headteacher recommended ISR
17. Headteacher and Deputy Headteacher funding points are allocated according to the unit total calculated for each school. The unit total is based on January numbers on roll whereby each mainstream child is allocated 7 units and each child with a Statement of Additional Learning Need (ALN) is allocated 10 units.

Unit Total	Headteacher Funding Point	Deputy Head Funding Point
0-1	13	7
2-334	14	8
335-667	15	9
668-1001	16	10
1002-1301	17	11
1302-1601	18	12
1602-1901	19	13

1902-2201	20	14
2202-2635	21	15
2636-3069	22	16
3070-3501	23	17
3502-3801	24	18
3802-4104	25	19

An additional point is given to heads and deputies of schools that host an STF unit and schools with a split site classroom. Schools that host an STF unit and also have a split site classroom are given an additional two points.

22. Number of pupils on roll multiplied by a teacher factor. This factor is revised each year to balance the overall budget shares to the amount of delegated funding available.
23. Social Deprivation factor. This line gives extra funding to schools in areas of social deprivation and is based on the percentage of children entitled to free school meals multiplied by the FTE number on roll and the free school meals factor.
24. Teacher Funding Total. The sum of lines 17-19.

#### **ASSOCIATE STAFF ELEMENT (Lines 21 - 30)**

- 21-22. Notional number of Teaching Assistants generated by multiplying nursery children by 0.024 and reception children by 0.0121. STF bands are allocated notional Teaching Assistants as required by the SEN Policy Document plus an additional allocation to reflect the full salary cost of support staff in cases where the total designated places exceed the recommended STF weightings.
23. If line 21 (mainstream) produces less than 1 Teaching Assistant this line gives a supplement to ensure that at least 1 Teaching Assistant is generated for each school.
24. TA Workforce. The Teaching Assistant element of the Workload agreement is calculated by multiplying the school total FTE by 0.0034.
25. Teaching Assistant funding is calculated by multiplying lines 21 to 24 by the TA salary. Teaching Assistants are funded on Point 6 of the Salary Scale plus oncosts, for 32 hours per week term time only. STF Teaching Assistants are also funded for a special class allowance.
26. Notional number of clerical assistants generated by multiplying the pupil FTE by 0.004. Enhanced clerical provision is given to STFs in accordance with the SEN Policy document.
27. If line 26 (mainstream) produces less than 0.4 of a clerical assistant, this line gives a supplement to ensure that 0.4 is generated.

28. The clerical funding is calculated by multiplying the sum of lines 26 and 270 by the clerical salary. Clerical assistants are funded on point 17 of the Salary Scale plus oncosts, for 30 hours per week term time only.
29. If a school has a teaching class or dining hall split from the main school building by a publicly maintained road a lump sum is given as shown in the appendix.
30. The total Associate Staff funding is the sum of lines 25, 28 and 29.

#### **CAPITATION ELEMENT (Lines 31 - 34)**

31. The small school supplement protects the level of funding in schools with under 200 FTE mainstream pupils. Each of these schools gets a lump sum which is reduced by an amount per FTE child (see appendix for amounts).
32. The basic allowance is calculated by allocating an amount per pupil (not the FTE). This figure is multiplied by a factor shown in the appendix.
33. It is recognised that resources are often necessary in both English and Welsh in Welsh medium schools. This allowance increases the basic capitation funding in line 32 by 10%.
34. The total capitation funding is the sum of lines 31, 32 and 33.

#### **PREMISES ELEMENT (Lines 35 to 37)**

35. The reckonable area is half of the sum of the pupil/place area (obtaining by allocating 5<sup>2</sup>m to the FTE pupil number as in line 15) and the building area of the school as in line 1.
36. Every school gets a premises lump sum.
37. The premises funding is the reckonable area (line 35) multiplied by an amount per square metre. The lump sum in line 36 is also added to this calculation.

#### **ELEMENTS (Lines 38)**

This calculates the actual funding the school will receive in the financial year from the 4 elements of the formula.

#### **ADDITIONS (Lines 39 - 48)**

51. Swimming Pools. An amount is given to reflect additional fuel costs associated with the running of a pool.
52. Kitchen Fuel. An amount is calculated annual based on the number of meals prepared in the previous year and the type of fuel used in the kitchen.
53. STF Staff Sickness. Amounts are allocated to schools hosting Specialist Teaching Facilities according to the number of STF teaching staff in the previous year's funding formula. Schools are able to join a Mutual Insurance Scheme that covers sickness from day one.
54. Long Term Sickness. Primary schools are able to join a Mutual Insurance Scheme that covers long term sickness of teaching staff.
55. Breakfast Club Supervision. Based on Number On Roll excluding rising 3s.
56. Salary Protection. Includes safeguarded salaries. In the case of 'amalgamating' schools, protected salaries will only be funded for staff at successive schools if these salaries

were in place at least one year prior to amalgamation or prior to the closure announcement, unless there has been prior agreement with the Authority.

57. ALN Budget. To support mainstream children with Additional Learning Needs . The amounts available to each school have been calculated on the basis of a formula based on funding four fifth for 80% of actual need (based on stated hours at each school in January) and the remainder of the funding calculated on free school meals and size of school to give a flexible resource, as of January 2022. One fifth calculated on free school meals, size of school with double weighting for Foundation Phase and half weighting for Post 16; and a lump sum for all schools with double lump sum for schools under 210FTE.
58. SLAs. Total of amounts delegated for individual SLAs (delegated either on number of pupils, lump sum or actual costs).
59. Transient protection. In the case of pupil mobility being 20% or over, an amount is calculated based on 10% of the average Age Weighted Pupil Numbers multiplied by the Number On Roll.
60. The total of lines 39 to 47.

#### **FINAL BUDGET SHARE (Line 49)**

The sum of the Elements and the Additions gives the final budget share.

50. Rates. Based on actual amounts.



## SECONDARY BUDGET SHARE

### SCHOOL ELEMENT (Lines 1 - 4)

- | <u>Line</u> | <u>Description</u>   |
|-------------|--|
| 1.          | Gross floor area of the school buildings (taken from the re-measuring of schools exercise)   |
| 2.          | Split Site Factor. Where a teaching class or dining hall is split from the main school building by a publicly maintained road. If the split area is a teaching class "1" is shown in this line. If the split area is a dining hall "0.5" is shown. |
| 3.          | Free School Meal %. This line shows the percentage of 11-16 children entitled to receive free school meals as recorded on the PLASC return.  |
| 4.          | Welsh Medium. "1" in this line indicates that the school teaches through the medium of Welsh.  |

### PUPILS ELEMENT (Lines 5 - 11)

5. This gives the number of places in the Specialist Teaching Facility (STF), if the school has one, as approved by Council.
- 6-11. The number of pupils in each age group. The April Mainstream numbers are as recorded on the PLASC return.

A newly amalgamated secondary school will have protected pupil numbers for three academic years at the number of pupils stated in the advertisement for the Headship of the school

### TEACHING ELEMENT (Lines 12 - 21)

12. Headteacher and Deputy Headteacher recommended ISR.
13. Headteacher and Deputy Headteacher funding points are allocated according to the unit total calculated for each school. Secondary schools are funded for two Deputy Headteachers. The unit total is based on January numbers on roll whereby each mainstream child is allocated 7 units and each child with a Statement of Additional Learning Need (ALN) is allocated 10 units.

<b>Unit Total</b>	<b>Headteacher Funding Point</b>	<b>Deputy Head Funding Point</b>
0-1	13	7
2-334	14	8
335-667	15	9
668-1001	16	10
1002-1301	17	11
1302-1601	18	12
1602-1901	19	13
1902-2201	20	14
2202-2635	21	15
2636-3069	22	16

3070-3501	23	17
3502-3801	24	18
3802-4104	25	19
4105-4401	26	20
4402-4701	27	21
4702-5001	28	22
5002-5626	29	23
5627-6251	30	24
6252-6876	31	25
6877-7501	32	26
7502-8376	33	27
8377-9251	34	28
9252-10126	35	29
10127-11001	36	30
11002-12501	37	31
12502-14001	38	32
14002-15501	39	33
15502-17001	40	34
17002-18501	41	35
18502-20001	42	36
20002-21501	43	37

An additional point is given to heads and deputies of schools that host an STF unit and schools with a split site classroom. Schools that host an STF unit and also have a split site classroom are given an additional two points.

14. The line gives teaching protection to small schools. For this purpose a small school is a school with less than 700 pupils in years 7 to 11. Small schools are allocated 9.6 teachers minus a sum equating to their Y7 to Y11 pupils multiplied by 0.0137.
15. Number of pupils on roll multiplied by a teacher factor. This factor is revised each year to balance the overall budget shares to the amount of delegated funding available.
16. Social Deprivation factor. This line gives extra funding to schools in areas of social deprivation and is based on the percentage of children entitled to free school meals factor.
17. Teacher Totals. The sum of lines 13-16.

#### **ASSOCIATE STAFF ELEMENT (Lines 18 - 24)**

18. A lump sum is allocated to each school.
19. The total number of pupils in the school is multiplied by the weighting in line 11 and by an amount per pupil. STFs are based on place numbers instead of pupils.

20. Tasks/Workforce. The Teaching Assistant element of the Workload agreement is calculated by the total number of learners in the school is multiplied by the weighting in line 11 and by an amount per pupil.
- 21-22. Teaching Assistants are generated for STFs. STF bands are allocated notional Teaching Assistants as required by the SEN Policy Document plus an additional allocation to reflect the full salary cost of support staff in cases where the total designated places exceed the recommended STF weightings.
23. The Teaching Assistant funding is calculated by multiplying line 21 and 22 by the TA salary.
24. The total Associate Staff funding is the sum of lines 19 to 20 and the STF totals.

### **CAPITATION ELEMENT (Lines 25 - 31)**

- 25-29 Calculated by multiplying the number of children in each year group by the relevant capitation amount. Exam fees are also added in years 11.
30. Welsh capitation funding. If line 4 = 1 then multiply the mainstream pupil total in line 11 by an amount per FTE pupil.
37. The sum of lines 25 to 30.

### **PREMISES ELEMENT (Lines 32 - 351)**

38. The reckonable area is half of the sum of the pupil/place area (obtaining by allocating 6.5<sup>2</sup>m to the pupil number as in line 11) and the building area of the school as in line 1.
39. If a school has a teaching class or dining hall split from the main school building by a publicly maintained road a lump sum is given as shown in the appendix.
40. Every school gets a premises lump sum.
41. The premises funding is the reckonable area (line 32) multiplied by an amount per square metre. The lump sum in line 33 is also added to this calculation.

### **ELEMENTS (Lines 36)**

This calculates the actual funding the school will receive in the financial year from the 4 elements of the formula.

### **ADDITIONS (Lines 37 - 46)**

50. Swimming Pools. An amount is given to reflect additional fuel costs associated with the running of a pool.
51. Kitchen Fuel. An amount is calculated annual based on the number of meals prepared in the previous year and the type of fuel used in the kitchen.

52. Long Term Sickness. Amounts are allocated to schools pro rata on line 15. Secondary schools are able to join a Mutual Insurance Scheme that cover long term sickness of teaching staff.
53. STF Staff Sickness. Amounts are allocated to schools hosting Specialist Teaching Facilities according to the number of STF teaching staff in the previous year's funding formula. Schools are able to join a Mutual Insurance Scheme that covers sickness from day one.
54. Service Level Agreements (SLAs). Total of amounts delegated for individual SLAs (delegated either on number of pupils, number of teachers, lump sum or actual costs).
55. Post 16 Funding. Applies to Schools with post 16 provision. The overall funding figure is provided by the Welsh Government and allocated to schools via a formula agreed with post 16 heads.
56. ALN Budget. To support mainstream children with Additional Learning Needs. The amounts available to each school have been calculated on the basis of a formula based on funding four fifths for 80% of actual need (based on stated hours at each school in January) and the remainder of the funding calculated on free school meals and size of school to give a flexible resource, as of January 2022. One fifth calculated on free school meals, size of school with double weighting for Foundation Phase and half weighting for Post 16; and a lump sum for all schools with double lump sum for schools under 210FTE.
57. Falling Roll Protection. If a school's roll has dropped by more than 10% (and a minimum of 30 pupils) from one year to the next then an allocation based on a teacher's salary is given as long as the school has less than 5% of delegated budget in reserves.
58. Salary Protection. Includes safeguarded salaries. In the case of 'amalgamating' schools, protected salaries will only be funded for staff at successive schools if these salaries were in place at least one year prior amalgamation or prior to the closure announcement, unless there has been prior agreement with the Authority.
59. Transient protection. In the case of pupil mobility being 20% or over, an amount is calculated based on 10% of the average Age Weighted Pupil Numbers multiplied by the Number On Roll.
60. The totals of lines 37 to 36.

### **FINAL BUDGET SHARE (Line 48)**

The sum of the Elements and the Additions gives the final budget share.

50. Rates. Based on actual amounts.

## SPECIAL BUDGET SHARE

### SCHOOL ELEMENT (Lines 1 - 5)

- | <u>Line</u> | <u>Description</u>   |
|-------------|--|
| 1.          | Gross floor area of the school buildings (taken from the Cleaning Contract Schedule).  |
| 2.          | Teachers Average Salary. All full-time and part-time permanent and temporary teachers as at the December payroll are included (including unqualified teachers). Head and Deputy are funded at actual salary as long as this is within the recommended ISR from Teachers' Payroll. Threshold is included in the average salary calculation at actual cost as at the December payroll and includes UPS1, UPS2 and UPS3. Salary points below UPS3 are rolled forward for the September to March period. |
| 3.          | Teaching Assistant Salary. Point 15 of Salary Scale for 32.5 hours a week, plus special class allowance.   |
| 4.          | Clerical Salary. Clerical assistants are funded on Point 13 of the Salary Scale (top of Scale 2) for 30 hours per week for term time only.   |
| 5.          | Free School Meals %. This line shows the percentage of children entitled to receive free school meals as recorded on the PLASC return.   |

### PUPILS ELEMENT (Lines 6 - 24)

- 6-24. As for primary STF pupil element.

### TEACHING ELEMENT (Lines 25 - 30)

25. Additional weighting given to SEN bands.
26. If planned places are less than 40 then 0.4 headteacher allowance is given. If planned places are more than 40 then 1 headteacher is allocated.
- 27-30. Number of pupils on roll multiplied by a teacher factor. This factor is revised each year to balance the overall budget shares to the amount of delegated funds available
28. PPA/Workforce/Performance management is calculated by multiplying the number of teachers generated in line 27 by 0.055.

### APT&C ELEMENT (Lines 31 - 37)

31. Additional Weighting given to SEN bands.
32. Teaching Assistants are allocated at a ratio specified by the SEN Policy Document.
33. Tasks/Workforce is calculated by multiplying the teachers generated in line 27 by 0.09.
34. The clerical allocation is the number of planned places multiplied by the capitation weighting on line 38
- 35-37. Funding is calculated by multiplying the notional Teaching and Clerical Assistants by the relevant average salary.

### **CAPITATION ELEMENT (Lines 38 – 43)**

- 38. Additional weighting given to STF bands.
- 39-42. The basic allowance is calculated by allocating an amount per pupil (not the FTE). This figure is multiplied by the weighting for STF bands.
- 43. The total capitation funding is the sum of lines 39-42.

### **PREMISES ELEMENT (Lines 44 - 48)**

- 44. Additional weighting given to SEN bands.
- 45. Sum of PLACES in each band x Weighting (Line 44)
- 46. The pupil/place area is obtained by allocating 6.5<sup>2</sup>m to each pupil place in line 45.
- 47. The reckonable floor area is the pupil/place area plus half the difference between pupil area and school area.
- 48. The premises funding is the reckonable area (line 48) multiplied by an amount per square metre. A lump sum is also added to this calculation.

### **ELEMENTS (Lines 49)**

This calculates the actual funding the school will receive in the financial year from the 4 elements of the formula.

### **ADDITIONS (Lines 50 - 58)**

Additions to the budget share for specific items. These are based on sub-formulas with the exception of salary protection which are based on actuals.

### **FINAL BUDGET SHARE (Line 59)**

The sum of the Elements and the Additions gives the final budget share

## Annually Reviewed Formula Factors

Primary Factors:

Line	Description	Factor			
18	Teaching Staff Factor	£2,059.51			
19	Social Deprivation Factor	0.800000			
	Plus enhanced for STF	Band E	1:9		
		Band F	1:7		
		Band G	1:5		
21	Level 2 TA salary @32.5 hrs per week	£26,241			
22	Level 3 TA salary @32.5 hrs per week	£27,588			
29	Split Site funding:				
	0.5 - Dining Hall	N/A			
	1 - Classroom	£16,582			
31	Small School Capitation:				
	Lump Sum	£2,224.73			
	£ per first 50 FTE pupils	£17.80			
	£ for next 150 FTE pupils	£8.90			
32	Basic Capitation per pupil	£76.67			
36	Premises Lump Sum	£5,000			
46	Premises Funding:				
	Amount per square metre	£20.98			

Secondary Factors:

Line	Description	Factor		
15	Teaching Staff Factor	£3,494.28		
	Plus enhanced SEN	Band E	1:9	
		Band F	1:7	
		Band G	1:5	
19	Associate Staff Lump Sum	£133,231		
20	Associate Staff per pupil	£109.05		
21	Tasks/Workforce per learner	£81.12		
27-31	Capitation	Year	Capitation	
		7	£108.86	
		8	£108.86	
		9	£108.86	
		10	£136.46	
		11	£350.74	
32	Welsh Capitation			
	Per mainstream pupil	£6.48		
39	Split Site funding:			
	0.5 - Dining Hall	Dd/b		
	1 - Classroom	£16,582		
40	Premises Lump Sum	£10,000		
41	Premises Funding:			
	Amount per square metre	£36.94		



Special Factors:

Line	Description	Factor			
25	Teaching per pupil	Band E	1:9		
		Band G	1:5		
		Band H	1:5		
40	Primary pupil Capitation	£52.73			
41-43	Secondary Capitation	Year	Per Pupil	Exam Fee	
		7	£73.82		
		8	£73.82		
		9	£73.82		
		10	£105.46		
		11	£101.40		
		12	£126.55	£31.64	
		13	£126.55	£84.36	
49	Premises Funding:				
	Amount per square metre	£20.14			
	Premises Lump Sum	£5000			