



Cyngor **Abertawe**
Swansea Council

Education Budget Statement 2021/22

Section 52 of the School Standards and Framework Act 1998



Cyngor **Abertawe**
Swansea Council

LA Annual Budget Statement 2021/2022

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.

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S52 EDUCATION BUDGET STATEMENT

Year: 2021-22

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 £		

Primary schools

Birchgrove Primary	2236			389	1,354	3,479	125	
Bishopston Primary School	2105			238	1,089	4,578	296	
Blaenymaes Primary School	2082			237	1,097	4,628	216	
Brynhyfyd Primary School	2247			413	1,567	3,799	242	
Brynmill School	2006			255	972	3,805	95	
Burlais Primary School	2243			475	2,107	4,432	604	
Cadle Primary School	2008			308	1,357	4,404	300	
Casllwchr Primary School	2108			201	764	3,797	50	
Christchurch Church In Wales	3306			143	618	4,317	61	
Cila Primary School	2109			117	517	4,425	22	
Clase Primary School	2073			291	1,645	5,646	667	
Clwyd Primary School	2069			333	1,782	5,357	695	
Clydach Primary School	2244			191	825	4,311	87	
Craigfelen Primary School	2215			177	823	4,646	142	
Crwys Primary School	2120			108	619	5,711	143	
Cwmglas Primary School	2077			250	1,095	4,387	221	
Cwmrhydyceirw Primary School	2014			504	1,667	3,305	149	
Danygraig Primary School	2017			203	1,041	5,129	307	
Dunvant Primary School	2237			322	1,289	3,998	275	
Gendros Primary School	2021			282	1,068	3,793	121	
Glais Primary School	2023			110	474	4,307	10	
Glyncollen Primary School	2226			184	763	4,149	85	
Gors Community School	2233			288	1,186	4,115	177	
Gorseinon Primary School	2246			250	962	3,851	79	
Gowerton Primary School	2240			352	1,230	3,499	102	
Grange Primary School	2027			134	695	5,186	132	
Gwyrosydd Primary School	2238			378	1,733	4,581	529	
Hafod Primary School	2032			217	974	4,485	176	
Hendrefoilan Primary	2096			196	742	3,778	49	
Knelston Primary	2217			94	423	4,511	21	
Llangyfelach Primary School	2157			219	789	3,609	43	

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					Per school £k	Per pupil £		

Primary schools

Llanrhidian Primary	2159			150	624	4,164	44	
Mayals Primary	2076			223	864	3,867	97	
Morrison Primary School	2040			150	1,048	6,987	472	
Newton Primary School	2092			212	742	3,498	24	
Oystermouth Primary School	2042			195	759	3,892	60	
Parkland Primary School	2086			561	1,970	3,514	339	
Penclawdd Primary School	2167			137	619	4,528	32	
Pengelli Primary	2172			110	497	4,521	21	
Penllergaer Primary School	2174			357	1,391	3,896	293	
Pennard Primary	2216			157	689	4,390	72	
Pentre'r Graig Primary School	2241			280	1,052	3,754	92	
Pentrechwyth Primary School	2048			138	658	4,761	92	
Pen-Y-Fro	2219			210	764	3,635	48	
Penyrheol Primary School	2176			233	932	3,994	106	
Plasmarl Primary School	2051			175	790	4,518	101	
Pontarddulais Primary School	2186			387	1,386	3,586	148	
Pontlliw Primary	2192			207	830	4,019	113	
Pontybreinin Primary School	2223			327	1,172	3,580	144	
Portmead Primary School	2075			201	1,066	5,295	335	
Sea View Primary School	2234			217	1,003	4,617	182	
Sketty Primary School	2054			444	1,452	3,272	92	
St Helen's Primary School	2055			205	874	4,265	117	
St Illtyds Primary	3305			184	737	4,016	57	
St Josephs Cathedral Primary School	3309			442	1,545	3,498	162	
St Joseph's R.C. Primary	3308			198	762	3,844	73	
St Thomas Community Primary School	2239			387	1,446	3,735	174	
St. David's Rc Primary School	3303			114	535	4,699	41	
Talycopa Primary School	2225			200	766	3,822	54	
Terrace Road Primary School	2059			262	1,080	4,127	154	
Townhill Primary School	2063			466	1,955	4,194	478	
Trallwn Primary School	2084			212	1,089	5,141	323	

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					(6) Per school £k	(7) Per pupil £			

Primary schools

Tre Uchaf Primary School	2211			204	1,128	5,529	417	
Waun Wen School	2067			178	797	4,473	103	
Waunarlwydd Primary School	2065			238	920	3,864	104	
Whitestone Primary	2095			120	783	6,511	286	
Y.G.G. Bryniago	2189			191	774	4,055	62	
Y.G.G. Brynymor	2098			246	870	3,542	41	
Y.G.G. Gellionnen	2232			231	865	3,753	65	
Y.G.G. Llwynderw	2235			322	1,103	3,426	52	
Y.G.G. Pontybrenin	2212			547	1,680	3,070	89	
Y.G.G. Tirdeunaw	2231			358	1,238	3,456	93	
Ynystawe Primary School	2071			182	701	3,858	36	
Ysgol Gymraeg Lon Las	2036			470	1,531	3,260	60	
Ysgol Gymraeg Tan-y-lan	2242			172	671	3,894	45	
Ysgol Gymraeg y Cwm	2245			148	640	4,330	34	
Ysgol Gymraeg Y Logyn Fach	2229			221	770	3,491	17	

(10) Totals/average primary schools

19,428	78,835	4,058	12,264	0
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					(6) Per school £k	(7) Per pupil £		

Secondary schools

Birchgrove	4075			486	3,478	7,149	873	
Bishop Gore School	4044			1,217	6,253	5,139	786	
Bishop Vaughan School	4600			1,122	5,410	4,823	310	
Bishopston Comprehensive	4069			1,106	5,591	5,054	653	
Cefn Hengoed	4031			871	4,794	5,506	696	
Dylan Thomas Community School	4076			578	3,999	6,916	1,116	
Gowerton Comprehensive School	4063			1,210	6,175	5,101	823	
Morrison Comprehensive	4033			1,040	5,654	5,436	797	
Olchfa School	4032			1,815	8,327	4,588	418	
Pentrehafod School	4043			1,055	5,780	5,481	947	
Penyrheol Comprehensive School	4062			893	4,927	5,517	565	
Pontarddulais Comprehensive School	4072			843	4,469	5,300	551	
Ysgol Gyfun Gwyr	4074			1,132	5,438	4,803	301	
Ysgol Gyfun Gymraeg Bryn Tawe	4078			918	4,563	4,970	294	

(11) Totals/average secondary schools

	14,287	74,859	5,240	9,130	0
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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) Budget share		(8) Notional S.E.N. budget £k	(9) Non-ISB Funds devolved to schools £k
					(6) Per school £k	(7) Per pupil £		

Special schools

Ysgol Pen-y-Bryn	7000			163	3,533	21,660		
Ysgol Crug Glas	7008			52	1,865	36,127		

(12) Totals/average special schools

	215	5,398	25,137	0	0
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(13) Totals for all schools

	33,929	159,092	4,689	21,395	0
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MEMORANDUM ITEMS

(14) UNALLOCATED ISB

Nursery	
Primary	
Middle	
Secondary	
Special	
Total	

(15) NON ALLOCATED NON-ISB FUNDS

Nursery	
Primary	13,547
Middle	
Secondary	4,927
Special	90
Total	18,564

(16) TOTAL ISB

159,092

S52 Education Budget Statement		Table 2: Funding Factors		
Year	LEA	Table Version No.	LEA No.	Completion Date
2021/2022	City & County of Swansea	1	670	31/03/2021

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)	£3,985	1,366.50	£5,445,690	
Reception	£3,229	2,337.83	£7,549,061	
Year 1	£2,977	2,475.50	£7,369,729	
Year 2	£2,977	2,508.42	£7,467,725	
Year 3	£2,977	2,491.17	£7,416,370	
Year 4	£2,977	2,607.25	£7,761,958	
Year 5	£2,977	2,732.33	£8,134,339	
Year 6	£2,977	2,678.83	£7,975,066	
Year 7	£4,244	2,538.42	£10,772,400	
Year 8	£4,244	2,569.42	£10,903,956	
Year 9	£4,244	2,606.83	£11,062,743	
Year 10	£4,270	2,492.25	£10,642,641	
Year 11	£4,345	2,417.58	£10,504,708	
Year 12	£0	0.00	£0	
Year 13	£0	0.00	£0	
	Primary	19,197.83	£59,119,939	
	Secondary	12,624.50	£53,886,447	
	Total	31,822.33	£113,006,386	73.53%

Type and factor name	Range or Level	Unit Value £	Pupil/Place Numbers	Funds Allocated	% of Primary & Secondary Budgets
SEN - Place-led Funding Treated as Pupil-led					
Primary	Band E	£11,386	250.00	£2,846,378	
	Band F	£13,969	88.00	£1,229,229	
	Band G	£21,169	23.00	£486,880	
Secondary	Band E	£11,329	193.00	£2,186,576	
	Band F	£13,784	93.58	£1,289,943	
	Band G	£19,977	16.50	£329,622	
	Primary		361.00	£4,562,487	
	Secondary		303.08	£3,806,142	
	Total		664.08	£8,368,629	5.45%
SEN Funding - Pupil-led					
	Primary			£7,781,165	
	Secondary			£5,197,414	
	Total			£12,978,579	9.66%
TOTAL OF FUNDING TREATED AS PUPIL-LED					
	Primary		19,558.83	£71,463,591	90.65%
	Secondary		12,927.58	£62,890,003	84.01%
	Total		32,486.42	£134,353,594	87.42%

Other Funding

Type and factor name	Unit Value £	Multiplier	Funds Allocated
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Site Specific Factors

Premises lump sum - Primary	£5,000.00	77	£385,000
Premises lump sum - Secondary	£10,000.00	14	£140,000
Excess Area - Primary	£20.17	19,747	£398,299
Excess Area - Secondary	£35.52	29,580	£1,050,743
Swimming Pools - Primary		1	£11,079
Swimming Pools - Secondary		4	£143,604
Rates - Primary			£1,248,205
Rates - Secondary			£1,216,724
Split Site - Primary			£57,320
Split Site - Secondary			£14,330
		Primary	£2,099,903
		Secondary	£2,565,401
		Total	£4,665,304

School Specific Factors

Curriculum Protection - Secondary			£261,525
Small School Capitation - Primary			£11,385
Small School Capitation - Secondary			£317,211
Welsh Capitation - Primary		9	£23,113
Welsh Capitation - Secondary		2	£10,747
Kitchen Fuel - Primary			£332,963
Kitchen Fuel - Secondary			£388,138
Long Term Sickness - Secondary			£3,527
Breakfast Club Supervision - Primary			£326,134
Salary Protection - Primary			£86,188
Salary Protection - Secondary			£12,504
Secondary Associate Staff Lump Sum	£118,687	14	£1,661,616
SLAs - Primary			£4,278,804
SLAs - Secondary			£1,218,156
Falling Roll Protection - Secondary			£0
Small School Clerical - Primary	£18,587	0.034	£629
Small School Teaching Assistant -Primary	£20,949	10.135	£212,314
		Primary	£5,271,530
		Secondary	£3,873,425
		Total	£9,144,954

TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS PRIOR TO Post-16 FUNDING

Primary	£78,835,024	
Secondary	£69,328,828	
Total	£148,163,852	96.40%

Post 16 Funding

Secondary mainstream

£5,529,770	3.60%
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TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS

Primary	£78,835,024	
Secondary	£74,858,598	
Total	£153,693,622	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	£12,017	101.0	£1,213,709
Band G	£22,336	69.0	£1,541,159
Band H	£0	49	£1,856,196
Total		219	£4,611,064

Pupil-led Funding

Nursery (fte)	£465.54	6.50	£3,026.00
Reception	£465.54	2.58	£1,202.64
Year 1	£465.54	4.08	£1,900.95
Year 2	£465.54	4.92	£2,288.90
Year 3	£465.54	6.17	£2,870.82
Year 4	£465.54	9.92	£4,616.59
Year 5	£465.54	7.42	£3,452.75
Year 6	£447.48	7.17	£3,206.97
Year 7	£512.03	23.25	£11,904.60
Year 8	£518.41	28.67	£14,860.96
Year 9	£499.41	19.83	£9,904.91
Year 10	£586.18	16.92	£9,916.15
Year 11	£591.24	21.83	£12,908.76
Year 12	£673.53	21.33	£14,368.68
Year 13	£725.93	18.58	£13,490.16
Year 14	£657.61	18.83	£12,385.06
Total		218	£122,305

Site Specific Factors

Premises lump sum	£5,000	2	£10,000
Split Site			£14,330
Excess Area	£20.17	759.64	£15,322
Swimming Pool	£21,280	1	£21,280
Total			£60,932

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

Curriculum Protection	£70,797	2	£141,594
Small School Capitation			£0
Kitchen Fuel		2	£5,700
Transport		2	£3,664
Long Term Sickness			£87,662
Salary Protection			£0
SLAs			£139,543
Residential Costs	£225,807	1	£225,807

Total			£603,970
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TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS			£5,398,271
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TOTAL FUNDS AVAILABLE TO ALL SCHOOLS			£159,091,893
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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.
- Two sets of data and calculations are used:
 - (i) April to August
 - (ii) September to March

This is because the school year runs from September to August and the financial year runs from April to March. Because the formula makes calculations using pupil numbers, it has to use the pupil numbers in April and the new pupil numbers in September to calculate the school's entitlement.

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. If in exceptional circumstances the number of children in the STF exceeds projected planned places on the subsequent PLASC return following pupil admission by the LA , a retrospective end of year adjustment is made for the period September to March. |
| 6–14. | The number of pupils in each age group. |

The April mainstream numbers are as recorded on the PLASC return (adjusted for exclusions and admission of excluded pupils between the enumeration date and the date of budget share issue). The April Nursery is an estimate by the school of the number of 3 year olds expected to be on roll at the second week of the Summer Term. This is because the LA funds nursery pupils for a maximum of 4 terms dependant upon when the child reaches the age of 3. The Nursery number estimated is updated when actual figures are known during the second week of the Summer Term.

The September mainstream pupils are a roll-forward of the April roll, except for nursery and reception which are estimated by the school. Again an adjustment is made at the end of the year when the subsequent PLASC return is used to update the September to March mainstream pupils (again adjusted for exclusions). STF pupil numbers are provided by the Additional Learning Needs Unit and the September figures are updated in the subsequent January.

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 excluding the rising 3 nursery pupils shown in line 6). |
| 16. | This gives the total number of pupils in the school (Full time equivalent) for January which includes the rising 3 nursery pupils shown in line 6. |

TEACHING ELEMENT (Lines 17 - 21)

17. Additional weighting given to STF bands.
18. 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 Special Educational Need (SEN) 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 18-20.

ASSOCIATE STAFF ELEMENT (Lines 22 - 34)

25. Additional weighting given to STF Bands.
- 23-24. 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.

25. If line 23 (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.
26. TA Workforce. The Teaching Assistant element of the Workload agreement is calculated by multiplying the school total FTE by 0.0034.
27. Teaching Assistants are funded on Point 15 of the Salary Scale plus oncosts. STF Teaching Assistants are also funded for a special class allowance.
28. Teaching Assistant funding is calculated by multiplying lines 23 and 24 by the TA salary.
29. 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.
30. If line 29 (mainstream) produces less than 0.4 of a clerical assistant this line gives a supplement to ensure that 0.4 is generated.
31. Clerical assistants are funded on Point 13 of the Salary Scale (top of Scale 2) for 30 hours per week for term time only.
32. The clerical funding is calculated by multiplying the sum of lines 29 and 30 by the salary in line 31.
33. 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.
34. The total Associate Staff funding is the sum of lines 28, 32 and 33.

CAPITATION ELEMENT (Lines 35 - 39)

35. Additional weighting given to STF bands.
36. 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).
37. The basic allowance is calculated by allocating an amount per pupil (not the FTE). This figure is multiplied by the weighting in line 35 for STF bands.
38. 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 37 by 10%.
39. The total capitation funding is the sum of lines 36, 37 and 38.

PREMISES ELEMENT (Lines 40 to 46)

40. Additional weighting given to STF bands.
41. Pupils:Places. Children in Reception to Y6 count as 1 and Nursery pupils are counted as a half. STF places are multiplied by the weighting in line 40.
42. The pupil/place area is obtained by allocating 5²m to each pupil:place in line 41.
43. The figure in this line is the building area of the school as in line 1.
44. The reckonable area is half of the sum of lines 42 and 43.
45. Every school gets a premises lump sum.
46. The premises funding is the reckonable area (line 44) multiplied by an amount per square metre. The lump sum in line 45 is also added to this calculation.

ELEMENTS (Lines 47 - 51)

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

i.e. $\frac{5}{12}$ of the April-August funding figures

$\frac{7}{12}$ of the September-March funding figures

ADDITIONS (Lines 52 - 60)

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. Amounts are allocated to schools pro rata on lines 19 and 20. 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. SEN Budget. To support mainstream children with Special Educational Needs (formerly funded through the SEN Survey and Severe and Complex needs). The amounts available to each school have been calculated on the basis of a formula based on funding 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.
58. SLAs. Total of amounts delegated for individual SLAs (delegated either on number of pupils, lump sum or actual costs).
59. The total of lines 52 to 59.

FINAL BUDGET SHARE (Line 61)

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

61. 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. | Miles between sites. |
| 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. If in exceptional circumstances the number of children in the STF exceeds projected planned places on the subsequent PLASC return following pupil admission **by the LA**, a retrospective end of year adjustment is made for the period September to March.
- 6-11. As for primary pupil element. The year 7 September mainstream figures are estimated by the school

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. Additional weighting given to STF bands.
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 Special Educational Need (SEN) 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
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. This line gives teaching protection to small schools. For this purpose a small school is a school with less than 700 mainstream 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 - 25)

18. Additional Weighting given to STF bands.
19. A lump sum is allocated to each school.
20. The total number of pupils in the school is multiplied by the weighting in line 18 and by an amount per pupil. STFs are based on place numbers instead of pupils.
21. 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.

22-23. 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.

24. The Teaching Assistant funding is calculated by multiplying line 22 and 23 by the TA salary.

25. The total Associate Staff funding is the sum of lines 20 to 21 and the STF totals.

CAPITATION ELEMENT (Lines 26 - 33)

26. Additional weighting given to STF bands.

27-31 Calculated by multiplying the number of children in each year group by the relevant capitation amount. Exam fees are also added in years 11.

32. 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 27 to 32.

PREMISES ELEMENT (Lines 34 - 41)

38. Additional weighting given to STF bands.

39. Pupils:Places. All children count as 1 except pupils in STFs where the number of pupils is multiplied by the weighting in line 34.

40. The pupil/place area is obtained by allocating 6.5²m to each pupil:place in line 35.

41. The figure in this line is the building area of the school as indicated in line 1.

42. The reckonable area is half of the sum of lines 36 and 37, unless line 36 is bigger than line 1 in which case the figure in line 36 is used.

43. If a school has a teaching area or dining hall split from the main school building by a publicly maintained road a lump sum is given as shown in the appendix.

44. Every school gets a premises lump sum.

45. The premises funding is the reckonable area (line 38) multiplied by an amount per square metre. The lump sum in line 40 is also added to this calculation.

ELEMENTS (Lines 42 - 46)

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

i.e. $\frac{5}{12}$ of the April-August funding figures

$\frac{7}{12}$ of the September-March funding figures

ADDITIONS (Lines 47 - 56)

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. SEN Budget. To support mainstream children with Special Educational Needs (formerly funded through the SEN Survey, Post 16 SEN and Severe and Complex needs). The amounts available to each school have been calculated on the basis of a formula based on funding 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.
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. The totals of lines 47 to 55.

FINAL BUDGET SHARE (Line 57)

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

60. 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. Notional teachers and funding are allocated as for primary STFs.
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. Clerical Assistants are allocated as for primary schools.
- 35-37. Funding is calculated by multiplying the notional Teaching and Clerical Assistants by the relevant average salary.

CAPITATION ELEMENT (Lines 38 – 44)

As for primary year groups.

PREMISES ELEMENT (Lines 45 - 49)

- 45. Additional weighting given to SEN bands
- 46. Sum of PLACES in each band x Weighting (Line 45)
- 47. The pupil/place area is obtained by allocating 6.5²m to each pupil place in line 46.
- 48. The reckonable area is the pupil/place area plus half the difference between pupil area and school area.
- 49. 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 50 - 54)

As for Primary.

ADDITIONS (Lines 55 - 63)

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 64)

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

Annually Reviewed Formula Factors

Primary Factors:

Line	Description	Factor			
19	Teaching Staff Factor	£1,753.15			
20	Social Deprivation Factor	0.800000			
	Plus enhanced for STF	Band E	1:9		
		Band F	1:7		
		Band G	1:5		
23	Level 2 TA salary @32.5 hrs per week	£14,503			
24	Level 3 TA salary @32.5 hrs per week	£22,231			
33	Split Site funding:				
	0.5 - Dining Hall	N/A			
	1 - Classroom	£14,330			
	2 - Three sites	£14,330	Plus 1 teacher (average salary)		
35	Small School Capitation:				
	Lump Sum	£2,139.16			
	£ per first 50 FTE pupils	£17.12			
	£ for next 150 FTE pupils	£8.56			
37	Basic Capitation per pupil	£73.72			
45	Premises Lump Sum	£5000			
46	Premises Funding:				
	Amount per square metre	£20.17			

Annually Reviewed Formula Factors

Secondary Factors:

Line	Description	Factor		
15	Teaching Staff Factor	3141.92800 0		
	Plus enhanced SEN	Band E	1:9	
		Band F	1:7	
		Band G	1:5	
19	Associate Staff Lump Sum	£129,350		
20	Associate Staff per pupil	£105.87		
21	Tasks/Workforce per learner	£78.00		
22	Level 3 TA salary @32.5 hrs per week	£22,231		
23	Level TA salary @32.5 hrs per week	£14,503		
27-31	Capitation	Year	Capitation	
		7	£104.67	
		8	£104.67	
		9	£104.67	
		10	£131.21	
		11	£337.26	
32	Welsh Capitation			
	Per mainstream pupil	£6.23		
40	Premises Lump Sum	£10,000		
41	Premises Funding:			
	Amount per square metre	£35.52		

Special Factors:

Line	Description	Factor			
25	Teaching per pupil	Band E	1:9		
		Band G	1:5		
		Band H	1:5		
39	Small School Capitation:				
	Lump Sum	£1,986.47			
	£ per first 50 FTE pupils	£15.88			
	£ for next 150 FTE pupils	£7.94			
40	Primary pupil Capitation	£50.70			
41-43	Secondary Capitation	Year	Per Pupil	Exam Fee	
		7	£70.98		
		8	£70.98		
		9	£70.98		
		10	£101.40		
		11	£101.40		
		12	£121.68	£30.42	
		13	£121.68	£81.12	
49	Premises Funding:				
	Amount per square metre	£20.17			
	Premises Lump Sum	£5,000			