

**City and County of Swansea
Dinas a Sir Abertawe**



Education Budget Statement 2013/14

Section 52 of the School Standards and Framework Act 1998



LA Annual Budget Statement 2013/2014

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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(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

Brynhyfryd Junior School	2003			211	689	3,261	77	0
Brynhyfryd Infants School	2005			213	762	3,581	76	160
Brynmill Primary School	2006			305	948	3,114	63	104
Cadle Primary School	2008			339	1,236	3,650	282	135
Cwmrhydyceirw Primary School	2014			438	1,285	2,935	115	161
Danygraig Primary School	2017			260	1,042	4,016	293	92
Gendros Primary School	2021			289	923	3,194	95	109
Glais Primary School	2023			103	394	3,833	16	35
Grange Primary School	2027			221	784	3,540	131	78
Hafod Primary School	2032			224	803	3,590	83	83
Ysgol Gynradd Gymraeg Lon Las	2036			500	1,383	2,768	93	198
Morrison Primary School	2040			200	928	4,645	333	73
Oystermouth Primary School	2042			218	681	3,131	31	81
Pentrechwyth Primary School	2048			106	482	4,567	70	35
Plasmarl Primary School	2051			133	553	4,150	64	56
Sketty Primary School	2054			458	1,380	3,015	110	155
St Helen's Primary School	2055			174	666	3,824	93	57
Terrace Road Primary School	2059			230	827	3,604	109	84
Townhill Community Primary School	2063			439	1,539	3,508	365	161
Wauharlwydd Primary School	2065			267	851	3,191	97	95
Wau Wen Primary School	2067			160	594	3,704	75	68
Clwyd Community Primary School	2069			256	1,247	4,878	508	85
Ynystawe Primary School	2071			188	650	3,464	58	64
Clase Primary School	2073			197	1,099	5,577	555	72
Portmead Primary School	2075			200	703	3,524	63	74
Mayals Primary School	2076			207	657	3,172	53	80
Cwmglas Primary School	2077			288	1,025	3,554	199	102
Blaenymaes Primary School	2082			180	696	3,860	104	76
Trallwn Primary School	2084			205	816	3,986	188	82
Parkland Primary School	2086			471	1,446	3,070	176	160
Newton Primary School	2092			221	682	3,081	20	78

School name	Official reference number	School opening/ closing O/C	Date opening/ closing	Number of pupils	Budget share		Notional S.E.N. budget £k	Non-ISB Funds devolved to schools £k
					Per school £k	Per pupil £		
Whitestone Primary School	2095			155	753	4,864	265	49
Hendrefoilan Primary School	2096			222	703	3,159	32	72
Y.G.G. Bryn-Y-Mor	2098			260	845	3,250	92	102
Bishopston Primary School	2105			290	1,028	3,549	233	96
Casllwchwr Primary School	2108			209	687	3,290	51	77
Cila Primary School	2109			130	452	3,478	23	52
Craigcefnparc Primary School	2117			87	382	4,404	37	32
Crwys Primary School	2120			175	652	3,735	112	62
Ysgol Gynradd Gymraeg Felindre	2133			61	281	4,629	19	22
Llangyfelach Primary School	2157			162	551	3,400	40	63
Llanrhidian Primary School	2159			112	435	3,875	18	39
Penclawdd Primary School	2167			158	545	3,455	28	56
Pengelli Primary School	2172			73	350	4,822	19	23
Penllergaer Primary School	2174			347	1,281	3,695	319	131
Penyrheol Primary School	2176			195	700	3,586	94	62
Pontarddulais Primary School	2186			409	1,278	3,127	159	154
Ysgol Gynradd Gymraeg Bryniago	2189			208	708	3,396	50	88
Pontlliw Primary School	2192			183	609	3,326	34	63
Tre Uchaf Primary School	2211			182	785	4,316	232	65
Ysgol Gynradd Gymraeg Pontybrenin	2212			460	1,230	2,673	64	196
Craigfelen Primary School	2215			125	537	4,290	92	53
Pennard Primary School	2216			206	637	3,091	23	76
Knelston Primary School	2217			119	444	3,746	29	40
Pen-y-Fro Primary	2219			143	534	3,722	65	51
Pontybrenin Primary School	2223			304	893	2,938	60	112
Talycopa Primary School	2225			208	683	3,289	59	75
Glyncollen Primary School	2226			221	697	3,158	60	80
Ysgol Gynradd Gymraeg Y Login Fach	2229			229	728	3,172	45	88
Ysgol Gynradd Gymraeg Tirdeunaw	2231			438	1,276	2,915	97	174
Ysgol Gynradd Gymraeg Gellionnen	2232			248	806	3,246	75	94
Gors Community Primary School	2233			246	857	3,487	115	102
Sea View Community Primary School	2234			131	597	4,577	112	52
YGG Llwynderw	2235			265	793	2,997	25	110
Birchgrove Primary	2236			402	1,240	3,084	125	148
Dunvant Primary School	2237			317	1,012	3,188	84	100
Gwyrosydd Primary School	2238			399	1,397	3,499	277	147
St Thomas Community Primary School	2239			325	1,002	3,089	97	124

School name	Official reference number	School opening/closing O/C	Date opening/closing	Number of pupils	Budget share		Notional S.E.N. budget £k	Non-ISB Funds devolved to schools £k
					Per school £k	Per pupil £		
Gowerton Primary School	2240			322	1,077	3,342	78	114
Pentre'r Graig Primary School	2241			349	1,151	3,298	105	130
YGG Tan-y-lan	2242			57	325	5,677	15	47
Burlais Primary School	2243			549	2,004	3,648	473	191
Clydach Primary School	2244			213	819	3,847	99	61
Ysgol Gymraeg y Cwm	2245			19	303	15,824	12	18
Gorseinon Primary School	2246			348	1,238	3,560	131	132
St David's Catholic Primary School	3303			213	692	3,249	48	78
St Illtyd's R.C. Primary School	3305			228	784	3,435	107	84
Christchurch (C.I.W.) Voluntary Aided School	3306			134	493	3,680	59	56
St Josephs Catholic Primary School	3308			212	682	3,214	36	73
St Joseph's Cathedral Primary School	3309			579	1,734	2,993	154	173

(10) Totals/average primary schools

19,524	67,464	3,456	9,272	7,179
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S52 Education Budget Statement		Table 2: Funding Factors		
Year	LEA	Table Version No.	LEA No.	Completion Date
2013/14	City & County of Swansea	1	670	31/03/2013

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
AGE-WEIGHTED FUNDING					

Mainstream

Nursery Class (fte)	£3,269	1,674.67	£5,475,162		
Reception	£2,759	2,602.83	£7,181,668		
Year 1	£2,441	2,663.42	£6,500,806		
Year 2	£2,441	2,537.83	£6,194,286		
Year 3	£2,403	2,474.58	£5,945,911		
Year 4	£2,403	2,437.75	£5,857,409		
Year 5	£2,403	2,474.42	£5,945,511		
Year 6	£2,479	2,445.67	£6,061,660		
Year 7	£3,253	2,336.25	£7,600,636		
Year 8	£3,253	2,387.00	£7,765,743		
Year 9	£3,253	2,404.75	£7,823,490		
Year 10	£3,418	2,422.25	£8,279,650		
Year 11	£3,491	2,556.75	£8,924,403		
Year 12	£0	0.00	£0		
Year 13	£0	0.00	£0		
		Primary	19,311.17	£49,162,412	
		Secondary	12,107.00	£40,393,923	
		Total	31,418.17	£89,556,335	68.71%

Type and factor name	Range or Level	Unit Value £	Pupil/Place Numbers	Funds Allocated	% of Primary & Secondary Budgets
SEN Pupils With Statements					
Band CS					
	Nursery (fte)	£0	0.00	£0	
	Reception	£0	0.00	£0	
	Year 1	£4,676	1.17	£5,455	
	Year 2	£4,676	0.83	£3,896	
	Year 3	£4,676	1.58	£7,403	
	Year 4	£4,676	1.42	£6,624	
	Year 5	£4,676	6.17	£28,832	
	Year 6	£4,676	9.92	£46,366	
	Year 7	£2,546	4.00	£10,183	
	Year 8	£2,546	6.50	£16,547	
	Year 9	£2,546	9.17	£23,335	
	Year 10	£2,572	8.83	£22,716	
	Year 11	£2,572	12.50	£32,146	
	Year 12	£0	0.00	£0	
	Year 13	£0	0.00	£0	
	Primary		21.08	£98,576	
	Secondary		41.00	£104,926	
	Total		62.08	£203,502	0.16%

Type and factor name	Range or Level	Unit Value £	Pupil/Place Numbers	Funds Allocated	% of Primary & Secondary Budgets
SEN Pupils without Statements Band A	Nursery (fte)	£0	0.00	£0	
	Reception	£465	326.50	£151,771	
	Year 1	£466	329.50	£153,393	
	Year 2	£466	326.50	£151,996	
	Year 3	£466	323.25	£150,483	
	Year 4	£466	297.33	£138,418	
	Year 5	£466	280.08	£130,388	
	Year 6	£466	265.25	£123,482	
	Year 7	£324	237.00	£76,841	
	Year 8	£324	237.00	£76,841	
	Year 9	£324	237.00	£76,841	
	Year 10	£328	237.00	£77,628	
	Year 11	£328	237.00	£77,628	
Band B	Year 12	£0	0.00	£0	
	Year 13	£0	0.00	£0	
	Nursery (fte)	£0	0.00	£0	
	Reception	£1,433	100.50	£144,066	
	Year 1	£1,437	101.50	£145,833	
	Year 2	£1,437	100.50	£144,396	
	Year 3	£1,437	111.08	£159,602	
	Year 4	£1,437	116.42	£167,265	
	Year 5	£1,437	104.58	£150,263	
	Year 6	£1,437	88.67	£127,394	
	Year 7	£1,754	123.00	£215,706	
	Year 8	£1,754	129.67	£227,397	
	Year 9	£1,754	136.50	£239,380	
Band C	Year 10	£1,772	134.67	£238,584	
	Year 11	£1,772	130.33	£230,907	
	Year 12	£0	0.00	£0	
	Year 13	£0	0.00	£0	
	Nursery (fte)	£0	0.00	£0	
	Reception	£0	0.00	£0	
	Year 1	£4,584	29.92	£137,126	
	Year 2	£4,584	29.08	£133,307	
	Year 3	£4,584	33.25	£152,405	
	Year 4	£4,584	36.67	£168,066	
	Year 5	£4,584	39.83	£182,580	
	Year 6	£4,584	41.00	£187,928	
	Year 7	£2,553	39.58	£101,054	
Year 8	£2,553	32.33	£82,545		
Year 9	£2,553	26.33	£67,227		
Year 10	£2,579	26.83	£69,195		
Year 11	£2,579	21.00	£54,152		
Year 12	£0	0.00	£0		
Year 13	£0	0.00	£0		
	Primary		3,081.42	£3,000,162	
	Secondary		1,985.25	£1,911,925	
	Total		5,066.67	£4,912,087	3.77%

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	£10,237	207.50	£2,124,088	
	Band F	£11,915	46.00	£548,085	
	Band G	£18,626	22.00	£409,781	
Secondary	Band E	£10,172	169.83	£1,727,464	
	Band F	£11,390	62.00	£706,169	
	Band G	£16,938	10.00	£169,380	
	Primary		275.50	£3,081,954	
	Secondary		241.83	£2,603,013	
	Total		517.33	£5,684,967	4.36%

Range or Level	Unit Value £	Weighting*	Funds Allocated
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Severe and Complex Needs Funding - Pupil-led

Primary	£52	35,612.69	£1,842,043	
Secondary	£52	22,154.60	£1,145,932	
	Primary	35,612.69	£1,842,043	
	Secondary	22,154.60	£1,145,932	
Total	Total	57,767.29	£2,987,975	2.89%

* where NOR = 1, FSM = 2, WIMD = 1, lowest incidence pupils = 4

TOTAL OF FUNDING TREATED AS PUPIL-LED

Primary	19,586.67	£57,185,147	84.76%
Secondary	12,348.83	£46,159,720	73.43%
Total	31,935.50	£103,344,867	79.29%

Other Funding

Type and factor name	Unit Value £	Multiplier	Funds Allocated	% of Primary & Secondary Budgets
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Site Specific Factors

Premises lump sum - Primary	£29.15	1,805.1	£52,618	
Premises lump sum - Secondary	£7,993.57	14	£111,910	
Excess Area - Primary	£29.15	20,397	£594,554	
Excess Area - Secondary	£29.89	28,699	£857,777	
Swimming Pools - Primary		1	£10,712	
Swimming Pools - Secondary		5	£138,845	
Rates - Primary			£892,031	
Rates - Secondary			£1,095,785	
Split Site - Primary			£195,923	
Split Site - Secondary			£0	

Primary	£1,745,838
Secondary	£2,204,317

Total	£3,950,155
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School Specific Factors

Curriculum Protection - Primary	£50,268	79.20	£3,981,095	
Curriculum Protection - Secondary	£45,554	56.548	£2,576,007	
Workforce Remodelling - Primary			£305,952	
Workforce Remodelling - Secondary			£91,985	
Small School Capitation - Primary			£15,807	
Small School Capitation - Secondary			£324,349	
Welsh Capitation - Primary		9	£22,283	
Welsh Capitation - Secondary		2	£7,264	
Kitchen Fuel - Primary			£308,370	
Kitchen Fuel - Secondary			£364,552	
Long Term Sickness - Primary			£73,745	
Long Term Sickness - Secondary			£42,519	
Salary Protection - Primary			£63,881	
Salary Protection - Secondary			£106,384	
Secondary APT&C	£106,116	15	£1,591,742	
Severe & Complex Needs (Phasing) Primary			£1,788,679	
Severe & Complex Needs (Phasing) Secondary			£1,199,294	
New School Funding - Primary		2	£280,421	
New School Funding - Secondary			£0	
SLAs - Primary			£1,544,028	
SLAs - Secondary			£1,908,121	
Falling Roll Protection - Secondary			£0	
Secondary SEN			£218,000	
Small School Clerical - Primary	£13,960	0.813	£11,354	
Small School Nursery Nurse -Primary	£20,155	6.834	£137,746	

Primary	£8,533,362
Secondary	£8,430,217

Total	£16,963,579
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**TOTAL FUNDS AVAILABLE TO MAINSTREAM
SCHOOLS PRIOR TO ELW_a FUNDING**

Primary	£67,464,347	
Secondary	£56,794,254	
Total	£124,258,601	95.34%

Post 16 Funding

Secondary mainstream

£6,071,587	4.83%
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**TOTAL FUNDS AVAILABLE TO MAINSTREAM
SCHOOLS**

Primary	£67,464,347	
Secondary	£62,865,841	
Total	£130,330,188	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	£9,960	85	£846,576
Band G	£18,973	83.0	£1,574,738
Band H	£0	0	£0
Total		168	£2,421,315

Pupil-led Funding

Nursery (fte)	£441.34	1.83	£809.13
Reception	£441.34	2.83	£1,250.47
Year 1	£441.34	5.50	£2,427.39
Year 2	£441.34	2.83	£1,250.47
Year 3	£441.34	2.33	£1,029.80
Year 4	£441.34	2.08	£919.47
Year 5	£441.34	5.00	£2,206.72
Year 6	£441.34	6.67	£2,942.29
Year 7	£475.29	21.17	£10,060.36
Year 8	£443.43	12.58	£5,579.78
Year 9	£463.12	15.75	£7,294.08
Year 10	£536.35	17.67	£9,475.44
Year 11	£523.65	18.00	£9,425.78
Year 12	£643.85	21.25	£13,681.86
Year 13	£677.58	12.67	£8,582.74
Year 14	£612.73	14.25	£8,731.36
Total		162	£85,667

Site Specific Factors

Premises lump sum	£3,950	2	£7,900
Excess Area	£26.73	733.77	£19,615
Swimming Pool	£24,713	1	£24,713
Total			£52,228

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

Curriculum Protection	£49,809	2	£99,618
Small School Capitation			£91
Workforce Remodelling			£8,717
Threshold			£0
Kitchen Fuel		2	£5,354
Transport		2	£4,254
Long Term Sickness			£95,228
Salary Protection			£7,980
SLAs			£40,139
Residential Costs	£256,818	1	£256,818
School Nurse	£0	1	£0

Total			£518,199
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TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS	£3,077,409
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TOTAL FUNDS AVAILABLE TO ALL SCHOOLS	£133,407,597
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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>
1.	Gross floor area of the school buildings (taken from the recent 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. If a school is based on three sites "2" 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 provided 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). The numbers of pupils in the SEN bands are taken from an annual SEN Survey. For band C and CS the teacher and capitation funding follows a child when they change schools or when their level of teaching support changes. The funding is credited/debited under a separate method to the budget share calculation. Money does not move for any other bands or STF children. STF pupil numbers are provided by the Education Psychology and Formal Assessment Team (EPFAT) 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 - 24)

17. Additional weighting given to SEN bands.
- 18-19. Notional number of teachers generated by multiplying the number of mainstream children (FTE) in each year group by the relevant factor (see Appendix for all factors). Teachers for SEN bands are allocated according to the SEN Policy Document - for example, band CS pupils are allocated funding for the required half an hour a day teaching support that will be built into their Statement of Special Educational Need.
20. This small school supplement ensures that an addition to staffing is made which does not depend upon pupil numbers in order to protect the funding of smaller schools. This is calculated by giving each school 1.6 teachers and reducing this by the FTE of the school multiplied by 0.0025.
21. Social deprivation factor. This line attempts to give extra funding to schools in areas of social deprivation and is based on the percentage of children entitled to free school meals. The free school meals percentage on line 4 is multiplied by the sum of lines 18 to 20 then multiplied by 0.000553.
22. Teacher Totals. The total of lines 18 to 21.
23. Each school's individual average salary is used for mainstream and for SEN band children in all schools. This includes all full-time and part-time permanent and temporary teachers as recorded on the January payroll (salary points below M6 are rolled forward for the September to March period). Threshold is included in the average salary calculation at actual cost as at the January payroll and includes UPS1, UPS2 and UPS3. An estimate is included for September based on eligibility for progression on the Upper Pay Scale. The Primary Support Officers advise of any known changes for the coming year – for example, if a teacher is to retire or a temporary contract is to end in August. Each school is funded for one Head and one Deputy Head. Additional Deputy Heads and Assistant Heads are not funded as it is an individual school's decision whether or not to have these posts in place. The staff are included in the average salary calculation at the salary point, including upper pay scale, that they would have been paid on prior to their Deputy/Assistant Head appointment.

24. 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
0-500	15	9
501-750	16	10
751-1300	17	11
1301-1600	18	12
1601-1900	19	13
1901-2525	20	14
2526-2850	21	15
2851-3175	22	16
3176-3875	23	17
3876-4250	24	18
4251-4625	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.

Headteacher and Deputy Headteacher funding points are frozen at current levels unless new appointments are made or there are changes to grouping.

An amount is included in the average salary for Management Allowances/Teaching and Learning Responsibility Points at a formula driven level rather than actual cost. The amount is based on the formula allocation of teachers in the previous year's budget share.

Formula Teachers (excluding STF)	Amount included
<4.5	£0
4.5	£1,993
5.5	£3,985
6.5	£5,978
7.5	£7,970
8.5	£9,963
9.5	£11,955
10.5	£13,948
11.5	£15,940
12.5	£17,933
13.5	£19,926
14.5	£21,918
15.5	£23,911
16.5	£25,903
17.5	£27,896
18.5	£29,888
19.5	£31,881
20.5	£33,874

21.5	£35,866
22.5	£37,859
23.5	£39,851

STFs are calculated on an average teacher's salary for the individual unit based on all teachers on the January payroll, including threshold.

The teacher funding is calculated by multiplying the notional number of teachers in line 22 by the average teacher salary in line 23.

ASSOCIATE STAFF ELEMENT (Lines 25 - 35)

25. Additional weighting given to SEN bands
26. Notional number of Nursery Nurses generated by multiplying nursery children by 0.024 and reception children by 0.0121. STF bands are allocated notional nursery nurses 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.
27. If line 26 (mainstream) produces less than 1 Nursery Nurse this line gives a supplement to ensure that at least 1 Nursery Nurse is generated for each school.
28. Nursery Nurses are funded on Point 15 of the NNEB Scale for 32.5 hours per week. STF Nursery Nurses are also funded for a special class allowance.
29. Nursery Nurse funding is calculated by multiplying the sum of lines 26 & 27 by the salary in line 28.
30. 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.
31. If line 30 (mainstream) produces less than 0.4 of a clerical assistant this line gives a supplement to ensure that 0.4 is generated.
32. Clerical assistants are funded on Point 13 of the Salary Scale (top of Scale 2) for 30 hours per week for term time only.
33. The clerical funding is calculated by multiplying the sum of lines 30 & 31 by the salary in line 32.
34. 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. If the school is over more than two sites and the sites are more than 0.2 miles apart then the split site allocation should increase by the average salary of one teacher.
35. The total Associate Staff funding is the sum of lines 29, 33 & 34.

CAPITATION ELEMENT (Lines 36 - 40)

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

PREMISES ELEMENT (Lines 41 to 47)

- 41. Additional weighting given to SEN bands.
- 42. 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 41.
- 43. The pupil/place area is obtained by allocating 5²m to each pupil:place in line 42.
- 44. The figure in this line is the building area of the school as in line 1.
- 45. The reckonable area is half of the sum of lines 43 and 44.
- 46. Every school gets a premises lump sum.
- 47. The premises funding is the reckonable area (line 45) multiplied by an amount per square metre. The lump sum in line 46 is also added to this calculation.

ELEMENTS (Lines 48 - 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 53 - 62)

53. Swimming Pools. An amount is given to reflect additional fuel costs associated with the running of a pool.
54. 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.
55. New School Funding. Following the reorganisation and amalgamation of infant/junior/primary schools an amount is given to the new school that equates to 1 teacher in the first academic year, two-thirds in the second academic year and finally one-third in the third academic year. In addition, new school funding should also apply to the main named receiving school at the same level allocated to schools following amalgamation i.e. sum equal to that of a teacher's salary in the first academic year, two thirds in year two and one third in year three. This will only be given if the school actively supports the Authority's redeployment process, following any Local Authority advice. Pupil numbers at the new school will also be protected for one year at the figures stated in the advertisement for the Headship of the school.

Following a closure, the funding formula for receiving schools is amended to reflect September intake in each year group as per the results of the parental survey and not a roll forward from April. There will be no claw back in the main receiving school named in the statutory proposal. Note that this does not apply to amalgamating schools.

56. Long Term Sickness. Amounts are allocated to schools according to the number of teaching staff in the previous year's funding formula. Primary schools are able to join a Mutual Insurance Scheme that covers long term sickness of teaching staff.
57. Rates. Based on actual amounts.
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 to amalgamation or prior to the closure announcement, unless there has been prior agreement with the Authority.
59. Workforce Remodelling. Delegated to schools from 1st April 2004. The budget is allocated pro rata to schools according to number of teachers.

60. Severe and Complex Needs Budget. To support children with severe and complex needs (formerly funded through the individual support budget known as the 1:1 budget). The amounts available to each school have been calculated on the basis of a formula based on the number of pupils in the school, the free school meal percentage of a school, the number of pupils who are classified as WIMD (Welsh Index of Multiple Deprivation) and the number of pupils in a school with the most severe and complex needs. The new formula will be phased in over 4 years from the Outturn figure for 2010/11 (in 2013/14 50% of the funding is based on the Outturn figure and 50% on the formula).
61. SLAs. Total of amounts delegated for individual SLAs (delegated either on number of pupils, number of teachers, lump sum or actual costs).
62. The total of lines 53 to 61.

FINAL BUDGET SHARE (Line 63)

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

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 recent 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 - 15)

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.
- 6-15. As for primary pupil element. The year 7 September mainstream figures are estimated by the school. The September year 7 SEN band figures for Bands C and CS are taken from the primary feeder schools' year 6 survey results. The September year 7 SEN band figures for Band B are based on actual April numbers. All band A figures at secondary are estimated by the Education Psychology and Formal Assessment Team (EPFAT).

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 16 - 25)

16. Additional weighting given to SEN bands.
17. 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 0.0143.
- 18-19. Notional number of teachers generated by multiplying the number of mainstream children in each year group by the relevant factor (see Appendix for all factors). Teachers for SEN bands are allocated according to the SEN Policy Document.
20. All schools have 3.5 teachers as a minimum included in this line.
21. This line gives a split site factor if the school is based on more than one site, which varies depending on the miles between the sites.

22. Social Deprivation Allowance. Based on the percentage of children entitled to free school meals. The free school meals percentage on line 3 is multiplied by the allocation from lines 17 to 19 then multiplied by 0.0000906.
23. This line shows the total number of teachers generated.
24. The county average teacher's salary. For mainstream this is calculated annually using the actual salaries of all full-time permanent teachers (rolled forward in September if below M6), including Headteachers, Deputy Headteachers and Assistant Headteachers (less any allowances given for STFs or Split Sites or any grouping protections). STF salaries are individual for each school to ensure neutral funding. Threshold is included in the average salary calculations at actual cost as at the January payroll and includes UPS1, UPS2 and UPS3. An estimate is included for September based on eligibility for progression on the Upper Pay Scale.
25. The teacher funding is calculated by multiplying the notional number of teachers in line 23 by the average teacher salary in line 24.

ASSOCIATE STAFF ELEMENT (Lines 26 - 32)

26. Additional Weighting given to SEN bands.
27. A lump sum is allocated to each school.
28. The total number of pupils in the school is multiplied by the weighting in line 26 and by an amount per pupil. STFs are based on place numbers instead of pupils.
29. Nursery Nurses are generated for STFs. STF bands are allocated notional nursery nurses 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.
30. Nursery Nurses are funded on Point 15 of the NNEB Scale for 32.5 hours per week plus special class allowance.
31. The Nursery Nurse funding is calculated by multiplying line 29 by the salary in line 30.
32. The total Associate Staff funding is the sum of lines 27 and 28 and the STF totals.

CAPITATION ELEMENT (Lines 33 - 42)

33. Additional weighting given to SEN bands.
- 34-40. Calculated by multiplying the number of children in each year group by the relevant capitation amount. Exam fees are also added in year 11. (A small school protection also applies whereby a minimum of 100 pupils will be funded in any one year group from years 7 to 11).
41. Welsh capitation funding. If line 4 = 1 then multiply the mainstream pupil total in line 15 by an amount per f.t.e. pupil.
42. The sum of lines 34 to 41.

PREMISES ELEMENT (Lines 43 - 49)

43. Additional weighting given to SEN bands.
44. Pupils:Places. All children count as 1 except pupils in STFs where the number of pupils is multiplied by the weighting in line 43.
45. The pupil/place area is obtained by allocating 6.5²m to each pupil:place in line 44.
46. The figure in this line is the building area of the school as indicated in line 1.
47. The reckonable area is half of the sum of lines 45 and 46, unless line 45 is bigger than line 1 in which case the figure in line 45 is used.
48. Every school gets a premises lump sum.
49. The premises funding is the reckonable area (line 47) multiplied by an amount per square metre. The lump sum in line 48 is also added to this calculation.

ELEMENTS (Lines 50 - 53)

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 55 - 67)

55. Swimming Pools. An amount is given to reflect additional fuel costs associated with the running of a pool.
56. Kitchen Fuel. An amount is calculated annually based on the number of meals prepared in the previous year and the type of fuel used in the kitchen.
57. Long Term Sickness. Amounts are allocated to schools according to the number of teaching staff in the previous year's funding formula.
58. 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).
59. Rates. Based on actuals.
60. Post 16 Funding. Applies to Schools with post 16 provision. The overall funding figure is provided by DCELLS and allocated to schools via a formula agreed with post 16 heads.
61. Post 16 Mainstream SEN Funding. An additional amount of funding for post 16 mainstream SEN. The overall figure for Swansea is provided by DCELLS and allocated to schools via a local formula.

62. Workforce Remodelling. Delegated to schools from 1st April 2004. The budget is allocated pro rata to schools according to number of teachers.
63. Severe and Complex Needs Budget. To support children with severe and complex needs (formerly funded through the individual support budget known as the 1:1 budget). The amounts available to each school have been calculated on the basis of a formula based on the number of pupils in the school, the free school meal percentage of a school, the number of pupils who are classified as WIMD (Welsh Index of Multiple Deprivation) and the number of pupils in a school with the most severe and complex needs. The new formula will be phased in over 4 years from the Outturn figure for 2010/11 (in 2013/14 50% of the funding is based on the Outturn figure and 50% on the formula).
64. 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.
65. Salary Protection. Includes safeguarded salaries and allocations given for heads and deputies of schools with STFs. 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.
66. New School Funding. Following amalgamation or creation of new secondary schools, an amount is given to the new school that equates to three teachers in the first academic year, two in the second academic year and finally one in the third academic year. This will only be given if the school actively supports the Authority's redeployment process, following any Local Authority advice. Pupil numbers will also be protected for three years at the figures stated in the advertisement for the Headship of the school.

Following a closure, the funding formula for receiving schools is amended to reflect September intake in each year group as per the results of the parental survey and not a roll forward from April. There will be no claw back in the main receiving school named in the statutory proposal. Note that this does not apply to amalgamating schools.

FINAL BUDGET SHARE (Line 68)

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

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 January 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 January payroll and includes UPS1, UPS2 and UPS3. An estimate was included for September based on eligibility for progression on the Upper Pay Scale.
3.	Nursery Nurse Salary. Top of 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 - 29)

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.
- 27-29. Notional teachers and funding are allocated as for primary STFs.

APT&C ELEMENT (Lines 30 - 35)

30. Additional Weighting given to SEN bands.
31. Nursery Nurses are allocated at a ratio specified by the SEN Policy Document.
32. Clerical Assistants are allocated as for primary schools.
- 33-35. Funding is calculated by multiplying the notional NNEBs and Clerical Assistants by the relevant average salary.

CAPITATION ELEMENT (Lines 36 – 42)

As for primary and secondary year groups.

PREMISES ELEMENT (Lines 43 - 47)

As for secondary.

ELEMENTS (Lines 48 - 52)

As for Primary and Secondary.

ADDITIONS (Lines 53 - 61)

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 62)

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

Appendix to Table 2 Annexe

Annually Reviewed Formula Factors

Primary Factors:

Line	Description	Factor		Ratio	
18-19	Teaching per pupil	Nursery	0.03618	1:27.64	
		Reception	0.04018	1:24.89	
		Year 1	0.03878	1:25.79	
		Year 2	0.03878	1:25.79	
		Year 3	0.03808	1:26.26	
		Year 4	0.03808	1:26.26	
		Year 5	0.03808	1:26.26	
		Year 6	0.04048	1:24.70	
	Plus enhanced SEN	Band A	0.006		
		Band B	0.025		
		Band C	0.090		
		Band CS	0.090		
		Band E	1:8		
		Band F	1:7		
		Band G	1:5		
35	Split Site funding:				
	0.5 - Dining Hall	N/A			
	1 - Classroom	£13,808			
	2 - Three sites	£13,808	Plus 1 teacher (average salary)		
38	Small School Capitation:				
	Lump Sum	£2,097.22			
	£ per first 50 FTE pupils	£16.78			
	£ for next 150 FTE pupils	£8.39			
39	Basic Capitation per pupil	£71.28			
47	Premises Lump Sum	£657.73			
48	Premises Funding:				
	Amount per square metre	£29.15			

Secondary Factors:

Line	Description	Factor			
				Ratio	
18-19	Teaching per pupil	Year 7	0.054491	1:18.35	
		Year 8	0.054491	1:18.35	
		Year 9	0.054491	1:18.35	
		Year 10	0.057191	1:17.49	
		Year 11	0.057191	1:17.49	
	Plus enhanced SEN	Band A	0.0064		
		Band B	0.0344		
		Band C	0.05		
		Band CS	0.05		
		Band E	1:8		
		Band F	1:7		
		Band G	1:5		
21	Split Site funding:	Miles	Teachers		
		0.01	2		
		1	4		
		4	4.5		
27	APT&C Lump Sum	£124,642			
28	APT&C per pupil	£102.02			
34-40	Capitation	Year	Capitation	Exam Fee	
		7	£101.20		
		8	£101.20		
		9	£101.20		
		10	£126.86		
		11	£126.86	£199.22	
41	Welsh Capitation				
	Per mainstream pupil	£6.02			
48	Premises Lump Sum	£7,993.57			
49	Premises Funding:				
	Amount per square metre	£29.89			

Special Factors:

Line	Description	Factor			
25	Teaching per pupil	Band E	1:8		
		Band G	1:5		
37	Small School Capitation:				
	Lump Sum	£1,986.47			
	£ per first 50 FTE pupils	£15.88			
	£ for next 150 FTE pupils	£7.94			
38	Primary pupil Capitation	£67.52			
39-41	Secondary Capitation	Year	Per Pupil	Exam Fee	
		7	£93.61		
		8	£93.61		
		9	£93.61		
		10	£117.92		
		11	£117.92		
		12	£140.55	£47.84	
		13	£140.55	£103.13	
47	Premises Funding:				
	Amount per square metre	£26.73			
	Premises Lump Sum	£3,949.90			

City & County of Swansea - Special School Budget Share 2013/14
A Special School

13-Mar-13

Line	Description	Calculation	School Total							
			April	Sept						
1	Area of Building in m2	Data from Cleaning Schedule		2,570						
2	Teachers' Average Salary	Average of Full-Time Permanent Teachers at School	£45,607	£46,957						
3	Nursery Nurse Salary	Top of Scale for 32.5 Hours a Week plus SCA	£21,980	£21,980						
4	Clerical Salary	Top of Scale 2 for 30 Hours a Week	£14,185	£14,185						
5	Free School Meal %	From January PLASC	45.61	45.61						
6	Planned Places		118.0	118.0	85.0	33.0		85.0	33.0	
7	Nursery Pupils		0	0						
8	Reception Pupils		0	0						
9	Y1 Pupils		1	4						
10	Y2 Pupils		1	1						
11	Y3 Pupils		0	1						
12	Y4 Pupils		3	0						
13	Y5 Pupils		3	3						
14	Y6 Pupils		3	3						
15	Y7 Pupils		11	14	10	1		11	3	
16	Y8 Pupils		10	11	8	2		10	1	
17	Y9 Pupils		13	10	11	2		8	2	
18	Y10 Pupils		12	13	10	2		11	2	
19	Y11 Pupils		21	12	15	6		10	2	
20	Y12 Pupils		14	21	12	2		15	6	
21	Y13 Pupils		7	14	6	1		12	2	
22	Y14 Pupils		15	7	11	4		6	1	
23	Total(fte)	Actual Pupil Numbers for Reception to Y14 plus half of Nursery	114.0	114.0	83.0	31.0	0.0	83.0	31.0	0.0
24	Weighted Pupil Total		329.28	329.28	206.11	123.17	0.00	206.11	123.17	0.00
25	Teacher Weighting				8.00	5.00	5.00	8.00	5.00	5.00
26	Headteacher Allowance	If Planned Places are less than 40 then 0.4; otherwise 1	1.00	1.00						
27	Teachers Nursery - Y14	Places/Teacher Weighting (Line 25)	17.225	17.225	10.625	6.600	0.000	10.625	6.600	0.000
28	Teacher Total	Sum of Lines 26 & 27 (includes inflation for Performance M'gment)	18.308	18.308						
29	Teacher Funding	Line 28 x Line 2	£834,988	£859,704						
30	Associate Staff Weighting				8.00	3.00	1.00	8.00	3.00	1.00
31	Nursery Nurses	Planned Places/ APT&C Weighting (Line 30)	21.625	21.625	10.625	11.000	0.000	10.625	11.000	0.000
32	Clerical	Planned Places x Capitation Weighting (Line 36) x 0.004 (min.0.4)	1.368	1.368	0.844	0.524	0.000	0.844	0.524	0.000
33	Nursery Nurse Funding	Line 31 x Line 3	£475,318	£475,318						
34	Clerical Funding	Line 32 x Line 4	£19,405	£19,405						
35	Total APT&C Funding	Line 33 + Line 34	£494,723	£494,723						
36	Capitation Weighting				2.4833	3.9732	3.9732	2.4833	3.9732	3.9732
37	Small School Supplement	£1986.47 less £15.88 x 1st 50 weighted fte & £7.94 x next 150	£0	£0						
38	Basic (Primary)	Nursery to Y6 Pupils x Weighting (Line 36) x £67.52	£2,951	£3,219	£0.00	£2,950.83	£0.00	£0.00	£3,219.09	£0.00
39	(Y7- Y9)	Y7 to Y9 Pupils x Weighting (Line 36) x £93.61	£8,601	£8,973	£6,741.62	£1,859.72	£0.00	£6,741.62	£2,231.66	£0.00
40	(Y10-Y11)	Y10 to Y11 Pupils x Weighting (Line 36) x £117.92	£11,069	£8,023	£7,320.52	£3,748.03	£0.00	£6,149.24	£1,874.02	£0.00
41	Y12-Y14+Exam Fees(Y12/14)	Y12-Y14 Pupils x Line 37 x £140.55 +Exam Fees (Y12=£47.84,Y13=£103.13)	£15,422	£18,992	£11,314.45	£4,107.78	£0.00	£13,472.80	£5,519.10	£0.00
42	Capitation Funding	Sum of Lines 37 to 41	£38,043	£39,208						
43	Premises Weighting				2.4833	3.9732	3.9732	2.4833	3.9732	3.9732
44	Pupils/Places	Sum of PLACES in each band x Weighting (Line 43)	342.20	342.20	211.08	131.12	0.00	211.08	131.12	0.00
45	Pupil/Place Area	Line 44 times 6.5 sq.metres	2,224.30	2,224.30	1,372.02	852.28	0.00	1,372.02	852.28	0.00
46	Reckonable-Area	Pupil area plus 1/2 difference between pupil area and school area	2,397.15	2,397.15	1,478.64	918.51	0.00	1,478.64	918.51	0.00
47	Premises Funding		£68,031	£68,031						
48	Teaching Element	Line 29 (5/12ths April:7/12ths Sept)		£849,406						
49	Associate Staff Element	Line 35 (5/12ths April:7/12ths Sept)		£494,723						
50	Capitation Element	Line 42 (5/12ths April:7/12ths Sept)		£38,722						
51	Premises Element	Line 47 (5/12ths April:7/12ths Sept)		£68,031						
52	Total Formula Funding			£1,450,882						
53	Residential Costs			£256,818						
54	Workforce Remodelling			£78,442						
55	Swimming Pools			£0						
56	Kitchen Fuel			£3,901						
57	Transport	Cost of Minibus		£2,293						
58	Salary Protection	Head & Deputy Salaries Above Group and Salary Safeguarding		£7,980						
59	Long Term Sickness			£56,212						
60	SLAs	Service Level Agreements		£40,185						
61	Total Additions	Sum of Lines 53 to 62		£445,831						
62	Budget Share	line 52 + line 63		£1,896,713						

NB Staffing levels generated are a means of distributing funding only
 All salary figures include oncosts.

Cleaning Maintenance	Teachers' Payroll	Facilities Management	Annual Serv. Contrs.	Technical Advice
£892	£1,505	£770	£7,993	£1,285
SENS	Music	ICT	ELRS	Finance
£1,075	£0	£10,652	£2,390	£6,512
Legal	Curriculum ICT	HR	EDS	Procurement
£155	£1,186	£1,088	£2,128	£539
PSO				
£2,015				