

## Vale of Glamorgan Council

# Mainstream Schools Funding Formula 2023/24



## **Vale of Glamorgan Council Mainstream Funding Formula**

### **Contents**

1. Introduction	Page 3
2. School's Budget	Page 3
3. Pupil numbers	Page 6
4. Age weighted pupil unit (AWPU)	Page 7
5. Floor area allocations	Page 8
6. ALN Funding	Page 9
7. Lump sum allocations	Page 11
8. Free School Meal funding	Page 13
Breakdown of Primary AWPU	Appendix A
Breakdown of Secondary AWPU	Appendix B
Mainstream Schools Formula Summary	Appendix C

## **Vale of Glamorgan Council Funding Formula for Mainstream Schools**

### **1. Introduction**

This formula was constructed by the Mainstream schools funding formula review group (a sub-group of the Budget Forum) following the 2016/17 review of the funding formula for schools in accordance with Vale of Glamorgan Council's Fair Funding Scheme for Schools, the School Funding (Wales) Regulations 2010 and the School Standards and Framework Act 1998.

This formula has been reviewed and revised throughout the 2017/18 to 2022/23 financial years by the Budget Forum. This formula will be subject to continual review and will remain a regular item on the Budget Forum programme of work in order to ensure that it remains relevant and responds to changes in central government funding.

### **2. Budget**

The 2023/24 budget was approved by cabinet on February 16<sup>th</sup> 2023 and full Council on March 6<sup>th</sup> 2023.

The Council has awarded growth of £12.858M to the schools' budget however £2.3M of this growth has been allocated specifically for anticipated energy cost increases for the 2023/24 financial year; which has been centrally retained for distribution later in the financial year based on the pressure per school.

The growth that has gone into the schools funding formula is then £10.558M of which £7.893M was allocated to the mainstream sector as summarised in the table below.

#### **Pay Awards**

For non-teaching staff, an estimated pay award of 6% has been included in the overall schools' budget from April 2023.

The teacher's pay award for September 2022 has not yet been approved. The 2023/24 budget has allowed for a 6.5% increase from April 2023 as 1.5% of the 8% currently offered for September 2022 has not been consolidated. The budget allows for a further 5% for teaching staff from September 2023.

## Efficiency Savings

The Council has allocated an efficiency savings target to all schools of £2.75M of which £2.402M has been allocated to the mainstream sector. For the mainstream sector, this efficiency saving has been distributed via the Age Weighted Pupil Unit (AWPU).

## Total Schools Budget

The table below shows the total movement on the overall schools' budget.

<b>Schools Budget Growth</b>	<b>Mainstream Sector</b>	<b>Special Sector</b>	<b>Total</b>
<b>Schools' budget 2022/23</b>	<b>£91.656M</b>	<b>£13.297M</b>	<b>£104.953M</b>
<b>Growth</b>			
Pay Inflation	£6.714M	£0.994M	£7.708M
Demographic growth		£1.000M	£1.000M
Derw Newydd		£0.500M	£0.500M
Secondary Autism resource bases & outreach	£0.300M		£0.300M
Rates revaluations	£0.250M		£0.250M
ALN mainstream support	£0.250M		£0.250M
Free school meals	£0.379M	£0.021M	£0.400M
Learning and Wellbeing class (Horizon)		£0.150M	£0.150M
<b>TOTAL Growth</b>	<b>£7.893M</b>	<b>£2.665M</b>	<b>£10.558M</b>
<b>Transfers</b>			
Apprenticeship Levy	£0.247M	£0.036M	£0.284M
Derw Newydd		£0.200M	£0.200M
Breakfast Club management	-£0.046M		-£0.046M
Welsh Immersion	-£0.045M		-£0.045M
School's Decarbonisation fund	-£0.015M		-£0.015M
<b>Net transfers</b>	<b>£0.141M</b>	<b>£0.236M</b>	<b>£0.378M</b>
<b>Efficiency Savings</b>	<b>-£2.402M</b>	<b>-0.348M</b>	<b>-£2.750M</b>
<b>School's Formula total 2023/24</b>	<b>£97.289M</b>	<b>£15.850M</b>	<b>£113.139M</b>
Energy growth (to be allocated)			£2.300M
Schools Budget (cabinet report)			£115.439M

**Summary of movement on the Mainstream Schools Budget**

2022/23 Mainstream Schools Budget	£91.656M
Growth for pay inflation	£6.714M
Growth Other	£1.179M
Transfers (net)	£0.141M
Efficiency Savings	-£2.402M
<b>2023/24 Mainstream Schools Budget</b>	<b>£97.289M</b>
<b>Movement</b>	<b>6.1%</b>

### 3. Pupil Numbers

In order to ensure schools have sufficient funding to cover the September intake, funding is based on a calculation for adjusted pupil numbers. Adjusted pupil numbers are calculated as shown below

- Current number on roll (should match unverified January 2023 PLASC)
- Plus 50% of the projection for the following year number on roll (Jan 2024)
- Less 50% of the previous year (2022) forecast for the current year (Jan 2023)

Adding 50% of the projection for the following year ensures that the school has sufficient funding to manage the September intake. Deducting 50% of the previous year forecast will ensure an automatic claw-back for schools that had over projected pupil numbers and an additional allocation for those where pupil numbers had been under projected.

The adjusted pupil number calculation for the 2023/24 mainstream formula is identified in the table below.

	Jan 2023 (NOR/Plasc)	Jan 2023 (previous yr Estimate)	Jan 2024 Estimate	Adjusted Pupil Numbers
		<b>Less 50%</b>	<b>Plus 50%</b>	
Nursery/ Primary	12,344	12,450	12,388	12,318
Secondary (Year 7–11)	8,383	8,475	8,532	8,412
<b>TOTAL</b>	<b>20,727</b>	<b>20,925</b>	<b>20,920</b>	<b>20,730</b>

*Note – excludes Post 16 which is funded by the Post 16 grant*

The table below shows the overall increase in adjusted pupil numbers from the 2022/23 formula to the 2023/24 formula.

	Adj. pupil no. 22/23	Adj. pupil no. 23/24	Movement
Nursery/Primary	12,385	12,318	(67)
Secondary	8,302	8,412	110
<b>TOTAL</b>	<b>20,687</b>	<b>20,730</b>	<b>43</b>

#### **4. Age Weighted Pupil Unit – (AWPU)**

In accordance with the School Funding (Wales) Regulations 2010 and the School Standards and Framework Act 1998; at least 70% of the delegated schools budget must be allocated via pupil numbers. This allocation should be weighted by age to account for the different levels of funding required throughout the different year groups. The Vale of Glamorgan Council has allocated 71.5% of the schools' budget (excl. Post 16) via the AWPU.

For each full time pupil, a school will receive an Age Weighted pupil unit (AWPU) allocation as shown in the tables below.

##### **Primary Age Weighted Pupil Unit (AWPU)**

	<b>Nursery</b>	<b>Reception</b>	<b>Year 1-2</b>	<b>Year 3-6</b>
Pupil Allocation	£3,334.72	£3,444.73	£2,966.63	£2,688.83

The full breakdown of the Primary AWPU is shown at **Appendix A**.

##### **Secondary Age Weighted Pupil Unit (AWPU)**

	<b>Year 7-9</b>	<b>Year 10</b>	<b>Year 11</b>
Pupil Allocation	£3,530.56	£4,666.44	£4,808.14

\*note – sixth form pupils are funded by the Welsh Government post 16 grant and are not accounted for in this formula.

A full breakdown of the secondary AWPU calculation is shown at **Appendix B**.

## 5. Floor Area Allocations

To account for school costs that are driven by the size of the school building and its grounds; the following allocations are included in the formula.

<b>Basis</b>	<b>Allocation</b>	<b>Covering</b>
Internal Floor area	£18.43 per m2 This amount was originally calculated by looking at the actual spend of all schools and dividing by the entire floor area.	Repairs, maintenance, security, cleaning, refuse recycling, utilities. Roughly 50% of these costs are funded through the AWPU and the remaining 50% are funded through this floor area based allocation.
External grounds area	£0.42 per m2	Grounds Maintenance

Note – schools receive an additional £800 each to fund food recycling costs



## 6. ALN Funding

ALN Mainstream Funding has been divided into four areas

- i. Delegated ALN funding for resource units and outreach
- ii. Primary Additional Needs Fund (ANF)
- iii. Primary Mainstream ALN funding
- iv. Secondary Mainstream ALN funding

### i. Delegated ALN Funding for resource units and outreach provision

The following funding has been delegated to mainstream schools to manage ALN provision on behalf of the Local Authority.

	Placements	Funding
Jenner Park - Cognition and learning difficulties	22	£312,908
Jenner Park - ALN outreach		£123,486
High Street - Wellbeing/trauma (behavioural emotional and social difficulties)	8	£212,109
St Cyres - Physical and complex medical difficulties	7	£177,718
Whitmore - Autism base	20	£546,322
Pencoedtre - Autism Satellite	n/a	£114,944
Ysgol Bro Morgannwg Autism Satellite	n/a	£79,634
<b>TOTAL Delegated</b>		<b>£1,567,121</b>

**Mainstream Resource Units Delegated to Y Deri** – Gladstone resource units for wellbeing and trauma, the St Illtyd 's autism resource base and the Early Intervention Base (EIB) at St Joseph's primary school are now all delegated to Ysgol Y Deri under the Special School Formula.

**Non-delegated resource units** – Resource units at Y Ddraig and Palmerston are centrally retained and not delegated within the funding formula.

ii. **The Primary Additional Needs Fund (ANF) - £1.856M**

A budget allocated to schools to support pupils with a higher level of additional learning needs in the primary sector. The ANF funding allocated per school is pooled into one budget which is then reallocated to schools via the ANF panel.

The total ANF primary budget is £1.856M. The pooling of this budget helps schools to mitigate individual financial risk from high levels of ALN support. The ANF Funding is allocated to schools through the AWPU – as identified in appendix A.

iii. **Funding to support mainstream additional learning needs (ALN) in the primary sector £1.645M**

An amount allocated to primary schools to support pupils with Additional learning needs in mainstream education.

This funding is allocated as shown in the following table.

	<b>IDP/ School Action Plus</b>	<b>AWPU</b>
<b>Primary mainstream ALN</b>	£1,530.23 per pupil with an IDP, statement, or identified as school action plus. (82.5% of total primary allocation) Note – 876 pupils identified in Jan 2023	£24.67 per primary pupil. (18.5% of total primary allocation)
	<b>£1,341,093</b>	<b>£303,867</b>

iv. **Funding to support Additional Learning Needs (ALN) in the secondary sector £2.380M**

A budget allocated to secondary schools to support all pupils with ALN accessing mainstream education.

Schools receive an allocation of £4,012.68 per pupil identified with an IDP, or SAP, Statement. There were 593 pupils amounting to a total budget of £2.38M

## 7. Lump Sum Allocations

To account for costs regardless of school capacity and size, the following lump sum allocations are included in the formula.

Allocation	Amount	Basis of Calculation
Head teacher	Various	Midpoint of the Head teacher's salary range. Note – 3-19 schools receive two Head teacher allocations.
Administration	Based on school capacity Primary Less than 421           £ 49,945 421 or more           £ 66,594 Secondary               £166,485	Based on a grade 6 member of staff at 1.5FTE for primary <421, 2 FTE for primary >421 and 5 FTE for Secondary schools. (secondary allocation includes an exam officer) Note - Additional per pupil allocation included in the AWPU for admin of £14.45 per pupil.
Caretaking	Based on school capacity less than 421 - £ 33,297 less than 701 - £ 49,945 701 or more       £ 58,270	Based on a grade 6 member of staff and 1 FTE for schools up to 421 capacity, 1.5 FTE for schools up to 701 capacity, and 1.75 FTE for schools with a capacity above 701
SLA's	£16,749 per primary school £28,509 per secondary school	A lump sum to fund central recharges and SLAs for payroll (Employee services), HR, Creditors, Schools finance support, Licence fees, ICT (basic support), GDPR and E-Teach.
Rates/Rent/ Insurance	Various	Actual projected charges for rates, rent and foundation school premises insurance.
Listed buildings	From £7,500 to £15,000	Based on the estimated additional maintenance and repairs cost of listed school buildings.

2023/24 Mainstream schools funding formula

Waste water treatment	From £1,000 to £4,500	An allocation for the five schools required to pay for waste water treatment systems
Translation (Welsh medium )	Primary - £4,080 lump sum Age 3-19 School - £40,800	Lump sum in addition to a per pupil allocation of £10.18 per pupil in Welsh medium schools.
Food Waste Recycling	£800 per school	Schools are responsible from April 2019 for the collection of food waste previously managed by Vale Catering Services.
Breakfast Club	£10,000 per primary school	An additional amount per pupil is allocated via the AWPU
Split Site Allowance	£155,046 per school	Based on a non-teaching deputy head, and an allocation for additional admin and caretaking required for two sites.
Nursery split site allowance	£82,165 per school	For primary schools where the nursery school is on a split site across a main highway. Based on 1 teacher and a contribution towards additional caretaking and administration
Smaller schools' allowance	Pupil numbers less than 141 pupils            £57,192.33 211 pupils            £28,596.17	Protection for Primary schools under the optimum size of 210 pupils (excluding nursery). Based on the average teacher salary. One FTE for schools less than 141 and 0.5 FTE for schools less than 210.
Amalgamation and Transitional Funding	Various.	To phase in funding reductions due to amalgamations, or provide budget assistance to school transition

## 8. Free School Meals

Free school meal funding is not within the age weighted pupil units (AWPU) as not all pupils will attract funding.

The following table shows how the free school meal funding has been allocated to schools.

***Note – the eFSM data has been provided by the benefits section and includes both pupils eligible for free school meals, and those that are under the transitional protection arrangements.***

Allocation	Amount	Basis of calculation
Secondary Free School Meals	£513.00 per pupil eligible for free school meals	£2.70 meal price * 190 trading days.
Primary Free School Meals	£475.00 per pupil eligible for free school meals	£2.50 meal price * 190 trading days.

Schools opting into the Big Fresh Catering Company will be charged the full amount delegated for free school meals at the beginning of the financial year.

**Appendix A****Breakdown of Primary AWPU Allocation**

	<b>Nursery</b>	<b>Recep</b>	<b>Year 1-2</b>	<b>Year 3-6</b>	<b>Notes</b>
Teachers	£1,904.50	£1,904.50	£1,904.50	£1,904.50	Teaching ratios of 1:30 and the average primary teaching salary.
Foundation Phase LSA's	£755.90	£755.90	£277.80		1:8 in nursery and reception and 1:15 in year 1 to 2. Only 35% is accounted for as around 65% of this cost is met through the RCSIG grant
Primary PPA	£161.88	£161.88	£161.88	£161.88	
Technicians	£77.83	£77.83	£77.83	£77.83	1 technician to every 360 pupils
Admin	£14.45	£14.45	£14.45	£14.45	7% of the admin budget (93% allocated via lump sum allocations)
Midday Supervisors		£110.01	£110.01	£110.01	1 midday supervisor to every 45 pupils.
Supply/ Maternity	£88.63	£88.63	£88.63	£88.63	
Breakfast Club	£33.90	£33.90	£33.90	£33.90	In addition to lump sum allocation per school
DBS Checks	£1.30	£1.30	£1.30	£1.30	
Resources	£103.00	£103.00	£103.00	£103.00	
Premises	£133.82	£133.82	£133.82	£133.82	Repairs, Maintenance, Security, Utilities, Cleaning, Refuse, Recycling. In addition to premises budget led by floor area
ANF Fund	£150.70	£150.70	£150.70	£150.70	
Mainstream ALN	£24.67	£24.67	£24.67	£24.67	18.5% of mainstream ALN budget (remainder allocated by IDP/SAP)
Efficiency Savings	-£115.85	-£115.85	-£115.85	-£115.85	£2.75M efficiency savings target set by the Council for schools for 23/24.
<b>TOTAL</b>	<b>£3,334.72</b>	<b>£3,444.73</b>	<b>£2,966.63</b>	<b>£2,688.83</b>	

**Appendix B****Breakdown of Secondary AWPU Allocation**

	<b>Year 7-9</b>	<b>Year 10</b>	<b>Year 11</b>	<b>Notes</b>
Teachers	£2,987.67	£3,985.55	£3,985.55	Teaching ratios of 1:20 in years 7-9 and 1:15 in years 10 and 11. Using average secondary teaching salary.
Technicians	£207.54	£207.54	£207.54	1 technician to every 120 pupils.
Administration	£14.45	£14.45	£14.45	7% of the entire Admin budget. (93% allocated via lump sums)
Midday Supervisors	£110.01	£110.01	£110.01	1 midday supervisor to every 45 pupils.
Supply/ Maternity	£88.63	£88.63	£88.63	
DBS Checks	£1.30	£1.30	£1.30	
Resources	£103.00	£103.00	£103.00	
Exam Fees		£138.00	£279.70	
Premises	£133.82	£133.82	£133.82	Repairs, Maintenance, Security, Utilities, Cleaning, Refuse, Recycling. In addition to premises budget led by floor area
Efficiency Savings	-£115.85	-£115.85	-£115.85	2.75M efficiency savings target set by the Council for schools for 23/24.
<b>TOTAL</b>	<b>£3,530.56</b>	<b>£4,666.44</b>	<b>£4,808.14</b>	

**Appendix C****Mainstream Schools Formula Summary**

<b>Allocation</b>	<b>Method</b>	<b>Budget £'000</b>	<b>%</b>
Teachers (incl PPA)	AWPU	£53,890	55.39%
Head teacher	Lump sum based on HT range	£5,936	6.10%
LSA (Found. Phase)	AWPU	£2,876	2.96%
Technicians	AWPU	£2,704	2.78%
Admin	Lump sum based on Capacity and AWPU	£4,029	4.14%
Caretaker	Lump sum based on Capacity	£2,131	2.19%
Midday Supervisors	AWPU	£2,163	2.22%
DBS checks	AWPU	£27	0.03%
Sickness/Maternity	AWPU	£1,837	1.89%
<b>TOTAL STAFFING</b>		<b>£75,593</b>	<b>77.7%</b>
SEN (usually spent on staffing)	Resource base lump sums, school allocations based on IDPs/SAP/Statement	£7,507	7.72%
Premises and Grounds	AWPU and floor area	£8,329	8.56%
Resources	AWPU	£2,824	2.90%
School Meals	FSM entitlement	£2,117	2.18%
Allowances	Smaller schools, Split site, translation, amalgamation and transition	£1,478	1.52%
Central Support	Lump Sums	£965	0.99%
Breakfast Club	Lump Sum and AWPU	£878	0.90%
Efficiency Saving	AWPU	-£2,402	-2.47%
<b>TOTAL</b>		<b>£97,289</b>	<b>100%</b>

Note – The above table excludes the post 16 grant of £7.477M