Education Walsall

Schools Forum

10 October 2006

Section 52 Table 4 Data for 2006/07

- 1. Headteachers and Governors have requested details on the make up of budgets for their school. The most convenient way of disseminating the information is through circulation of the Section 52 Statement Table 4.
- 2. The Section 52 Statement is available electronically but in a format which is not friendly, mainly due to font size. Accordingly an improved copy of Table 4 has been generated for dissemination to all schools. A copy of the document is attached to this paper as an appendix.
- 3. Table 4 contains details on pupil led funding, non pupil led funding and school specific factors. Details are included of unit values for each element in the budget. Each factor in the formula is accompanied by a dialogue box, giving some indication of how unit values were arrived at.
- 4. Applying data from the January 2006 School Census, it will be possible for schools to calculate notional amounts in their budgets to meet costs for coverage of:
 - General curriculum (through the Age Weighted Pupil Unit)
 - SEN core provision
 - Additional SEN funding for high need pupils
 - Additional element to address social deprivation
 - Premises factors (largely based on floor area)
 - Additional input for swimming pools (where appropriate)
 - Personalised learning
 - Threshold allowance for teachers above UPS1
 - Small school allowance
 - Admissions (Foundation & VA schools)
 - Split Site allowances
 - Professional Development
 - NQT allowance
 - Retrospective pupil number adjustment, and
 - Minimum funding guarantee
- 5. Table 4 does not contain details of Standards fund grants, or the School Standards Grant. Neither does it contain details of other funding streams available to schools (for example from New Deal).

- 6. Governors are not obliged to spend amounts of money in direct proportion to the generation of resources in Table 4. Headteachers and Governors should draw up a budget reflecting their priorities for school development, within the total resources available to them. Comparing notional income with proposed expenditure can be helpful in justifying budget decisions.
- 7. Comments from schools would be welcomed on the usefulness of the improved Table 4, and any other information which could be provided by Education Walsall which would assist with financial management in schools.

EDUCATION WALSALL

SECTION 52 TABLE 4 DATA FOR 2006/2007

Details and methodology of the Funding Formula for Schools

Sept. 2006

SECTION 52 EDUCATION BUDGET STATEMENT			Table 4: Funding Factors			
YEAR	2006-2007	LEA	Walsall	LEA No.	335	E-Mail Address:

Nursery, Primary and Secondary Schools

PUPIL-LED FUNDING

PUPIL COUNT ARRANGEMENTS

As per regulation, the pupil count reflects the number of pupils recorded on PLASC 2006 data.

Band, Range or Level

Unit Value £

Total allocated through factor

PRE-SCHOOL PLACE-LED FUNDING TREATED AS PUPIL-LED (NURSERY CLASSES)

Nursery 3 year olds Nursery 3 year olds

Primary funded place
Nursery School funded

3,214.3923 4,628.5173

> Nursery: 629,478

> > Primary: 3,092,245

Method

Nursery Classes - The first 13 FTE places within a nursery class are funded through a 'planned place' unit of resource. Example: In a nursery class whose capacity is 13 fte places, this provision will represent the total funding of the nursery class.

Nursery Schools - The first 17 FTE places within a nursery school are funded through a 'planned place' unit of resource. Pupil numbers above 17 FTE are reflected in the nursery age weighted pupils allocations.

	AGE-WEIGHTED FUNDING					
•	Key Stage	School Year	Age group (pupils' ages as at 31 st August 2005)	Weighting Ratios		
		Nursery Schools		1.1895	2,246.87	
	-	Nursery	Primary	1.1898	2,247.55	
	-	Reception	4	1.149	2,172.19	
	1	1	5	1.003	1,894.38	
		2	6	1.003	1,894.38	
		3	7	1.000	1,888.92	
	2	4	8	1.000	1,888.92	
	2	5	9	1.000	1,888.92	
		6	10	1.000	1,888.92	Nursery:
		7	11	1.358	2,564.59	467,350
	3	8	12	1.358	2,564.59	Primary
		9	13	1.358	2,564.59	45,783,139

1.358

1.358

Pupil numbers
208.00
549.00
3150
3316
3301
3363
3403
3254
3306
3410
3554
3733
3839
3695

1

2,564.59

2,564.59

LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS

10

11

FTE Pupils (LSC Funded)

18,231

12,950,017

Secondary:

46,755,077

Secondary: 12.950.017

14

15

Total allocated through factor

As notified by LSC - including adjustments relating to 2005/06 pupil changes

LSC FUNDING GUARANTEE (1/4/06 - 31/8/06)

Secondary: 140,723

1,087,215

1,652,136

Method	
As notified by LSC	

OTHER PUPIL-LED FACTORS

SEN - PUPILS WITH STATEMENTS

Nursery

Primary

Secondary

		Nursery:
51.74	237.00	12,263

4587.41 237.00

6971.04 237.00

Method

SUPPORT FOR INDIVIDUAL PUPILS Allocations to schools to enable them to meet the needs of specific pupils whose more complex needs are identified within a Statement.

Weighting

Category One1.000Supporting Lunchtime SupervisionCategory Two1.592Supporting Learning Support Assistants

Category Three 3.779 Supporting Teaching

2

SEN - PUPILS WITHOUT STATEMENTS (Pupil-Led)

CORE PROVISION

Nursery

Level 1 single allocation

19,283

Nursery: 154,262

Band, Range or Level	Unit Value £	Total allocated through factor
Level 1 single allocation	19,283	
Level 1 resource unit	160.69	
Level 2 single allocation	34,411	Primary:
Level 2 resource unit	109.24	3,006,142
Level 3 single allocation	61,063.00	
Level 3 resource unit	84.81	
Level 4 single allocation	82,360.00	Secondary:
Level 4 resource unit	82.36	1,567,424

Secondary

Method

Core Provision This will be the main allocation enabling schools to meet the needs of all pupils with SEN and makes reasonable provision for SENCO costs including an amount of non contact time.

Blocks of core provision banded on funded pupil numbers:

Nursery and Primary Schools

Level 1 applied to schools whose funded pupil total is below 210. A single / minimum allocation to schools with less than 120 or for those whose number fall between 121 & 210 a unit of resource multiplied by their pupil number to a maximum of 210.

Secondary Schools

Level 3 applied to secondary schools whose funded pupil total is below 960.

A single / minimum allocation to schools with less than 720 or for those whose number falls between 721 & 960 a unit of resource multipli

3

0 - 8%

20 - 34%

ADDITIONAL LEVEL ONE

Nursery

Primary

•	
0 - 8%	11,137
9 - 19%	22,274
20 - 34%	27,843
35 - 49%	33,411
50% +	38,980

Primary: 2,239,929

Nursery:

228,309

11,137

27,843

33,411

38,980

Secondary

8% 50,117

David David and soul
Band, Range or Level
9 - 19%
20 - 34%
35 - 49%
50% +

Unit Value £				
61,2	54			
72,3	91			
83,5	28			
89,0	96			

Total allocated
through factor

Secondary: 1,219,502

Method

Additional Level 1 An allocation to all schools, which reflects the need to make provision for higher levels of special need, through the use of a 'free school meals' indicator. Schools are banded using the % of pupils 'entitled' to FSM recorded on thei

ADDITIONALLY RESOURCED UNITS

Nursery

Primary

Secondary

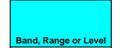
		Nursery:
		0.00
Speech & Language	10,182	
Nuture	10,182	
Sensory	15,981	
Physical	11,178	Primary:
Autism	18,646	1,058,644
Speech & Language	9,857	

Autism	18,646	1,058
_anguage	9,857	
Dyslexia	9,857	
Physical	10,853	Seco
Autism	18,321	312,

Method

Additionally Resourced Units

Resources provided to units located within schools on a place-led basis to meet the expenditure incurred in the provision of a range of special needs support, including Speech & Language, Nuture Group, Sensory, Physical, Autism and Dyslexia.



Total allocated through factor

4

NON PUPIL-LED FUNDING

SOCIAL DEPRIVATION FACTORS

SOCIAL DEPRIVATION

Primary

Nursery

Secondary

		Nursery:
95	182.45	17,333
	<u>. </u>	

Primary:
946,733

Secondary:
182.45

946,733

Method

Social Deprivation An allocation using the number of pupils eligible for free school meals as recorded on schools census data. The total number of eligible pupils is divided into the percentage of the ISB identified for this purpose. The resulting un

SITE SPECIFIC FORMULA FACTORS

PREMISES - BASE SUM

Nursery Nursery: G 501 - 899m 11,272 74.821 Primary A 900-1210m 20,863 B 1211-4000m 23,059 Primary C 4001m + 30,744 Secondary D 4000-7000m 47,741 Secondary: E 7000m + 63,017

Method

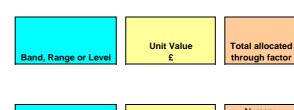
Premises - Base Sum An allocation to all schools, based on banded floor areas. The allocation recognises that some fixed costs remain the same or similar regardless of size.

PREMISE ALLOCATION

 Nursery
 Floor Area Weighting
 Nursery:
 Nursery:</

Method

Premise Allocation An allocation to all schools based on non weighted floor area for Primary and Secondary schools, and a weighted floor area for Nursery schools. The allocation reflects the need to maintain school premises including utilities. Additional funding has been included to reflect higher than average inflation in energy costs.



BUSINESS RATES

Nursery

Primary

Secondary

		Nursery:
55798 RV	0.433	24,159

Primary

2085337 RV 0.433

Secondary: 2157729 R\ 0.433 934,298

Method

Business Rates - Provides the funding required to meet a schools business rates liability, including any playing field.

SWIMMING POOLS - Learner and Deep Water

Nursery

Primary

Secondary

		Nursery:
		na
6 POOLS	208.00	Primary:
8 POOLS	8,827.00	71,860
		Secondary:
13 POOLS	2,077.000	27,000

Method

Swimming pools - Primary and Secondary only A weighted unit of resource to schools who have a pool on site. For learner pools in a primary school the allocation meets the costs of the emergency telephone and where utility bills are not separately ide

Weightings: 0.10 to learner pools to meet costs of emergency telephone

4.25 to learner pools for emergency telephone and utility bills

1.00 to secondary school pools

SWIMMING POOLS - CLEANING

Nursery

Primary

Secondary

_	

14 870.00 1307.60 sq mt, weighted 31.432 p/sqn

Primary: 53,280

Nurserv

1839.26 sq mt weighted

2,050.00 2,560.00 31.432 p/sqm

Secondary: 69,081

Method

Swimming Pools - Cleaning An allocation for schools with pools on site to meet associated additional costs - cleaning; pool chemicals; pool covers.

A single lump sum to all primary schools with a learner pool.

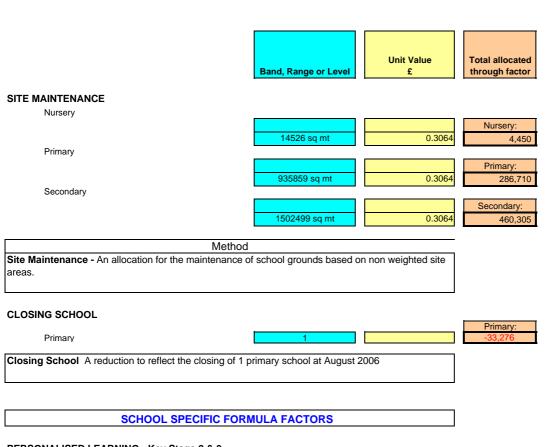
A lump sum banded on surface area less than 150 square metres to secondary pools

less than 115 sq.m 2,560

116 - 150 sq.m 2,050

In addition to lump sums all pools attract a weighted per square metre allocation.

Primary learner pool weighting 1.50 Secondary pool weighting 1.00



PERSONALISED LEARNING - Key Stage 2 & 3

Nursery Nursery na Primary Attainment Band 1, less than 5% 2.264 Band 1, 5% - 10% 4 52 Band 1, 5% - 10% 6,791 Band 1, 16% + 9,055 44.5847 Deprivation Primary 4.2898 **Pupil funding** 23113 pupils 661,000 Secondary 12,543.00 Attainment Band 1, less than 5% Band 1, 5% - 10% 25,086.00 Band 1, 5% - 10% 37 629 00 Band 1, 16% + 50,171.00 Deprivation 3259 meals 94.2927 Secondary: **Pupil funding** 18231 pupils 7.224 878,000

Method

Personalised Learning - Key Stage 2 & 3

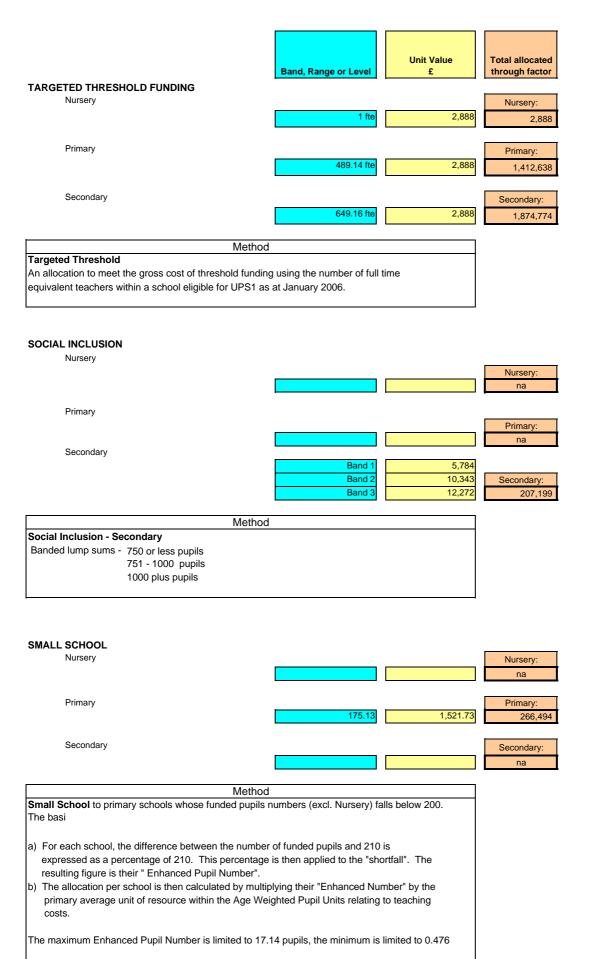
An allocation to primary and secondary schools made up of three elements; prior attainment data from summer 2005; deprivation and pupil numbers.

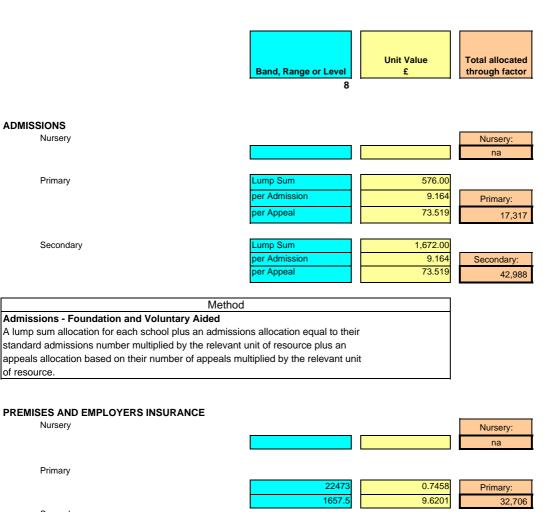
Secondary:

- 50% of funds allocated on a banded lump sum using the number of pupils in year 7 achieving below level 3 at key stage 2, expressed as a percentage of the total pupil roll, excluding post 16.
- 35% of funds allocated for deprivation using the number of pupil eligible for free school meals recorded on school census.
- 15% of funds allocated on pupils numbers (excluding post 16).

Primary:

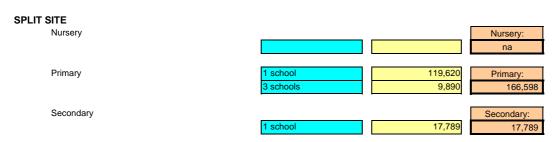
- 50% of funds allocated on a banded lump sum using the number of pupils achieving below level 2 at key stage 1, expressed as a percentage of the total pupil roll, excluding nursery
- 35% of funds allocated for deprivation using the number of pupil eligible for free school meals recorded on school census.
- 15% of funds allocated on pupils numbers (excluding nursery).





PREMISES AND EMPLOYERS INSURANCE Nursery Primary Secondary 0.7458 9.620 112,286

Method Premises and Employers Insurance - Foundation and Maintain schools who request delegation Premises = unit of resource x school's weighted floor area Employers = unit of resource x school's funded pupil number The weightings applied - for primary schools 2.25 - for secondary schools 1.00



Method

Split Site

ADMISSIONS Nursery

of resource.

Primary

Secondary

Lump sum allocation to three primary and one secondary school who need to operate on two sites and maintain two administrative bases.

A higher allocation to a new primary school opening in September 2006 across three sites. The allocation for the new school also meets, on a short term basis, fixed costs across the three sites.



Total allocated through factor

9

MANAGEMENT & PROFESSIONAL DEVELOPMENT

Nursery

less than 120 56,701.54

Primary

less than 200 201 - 400 401+ 9,947.64 10,743.45 11,728.27

Primary: 949,433

453,612

Secondary

upto 1000 1000+ 17,955.49 20,332.97 Secondary: 372.062

Method

Management & Professional Development

An allocation to support management and CPD functions.

Weighted lump sums banded on pupils:

 Nurs.
 less than 120
 5.70

 Prim.
 less than 200
 1.00

 201 - 400
 1.08

 401 +
 1.179

 Sec.
 upto 1000
 1.805

Costing basis - 0.1 gross head teacher salary in Primary and Secondary schools;

full gross head teacher salary in Nursery schools, each allocation is further enhanced by a sum for professional development.

1000 +

PROFESSIONAL SERVICES

Nursery

Primary

		Nursery:
single sum	8,487.46	67,900
upto 400 pupils	6,676.80	Primary:
400+ pupils	7,129.47	597,008
unto 1000 nunils	E 650 21	

2.044

Secondary

upto 1000 pupils	5,658.31	
1001 - 1300 pupils	6,054.39	Secondary:
1330+ pupils	6,620.22	116,618

Method

Professional Services

A weighted allocation to support the management functions within school.

 Primary
 upto 400 pupils
 1.18
 Secondary - upto 1000 pupils
 1.00

 400+ pupils
 1.26
 1001 - 1300
 1.07

 Nursery
 all schools
 1.50
 1300 +
 1.17

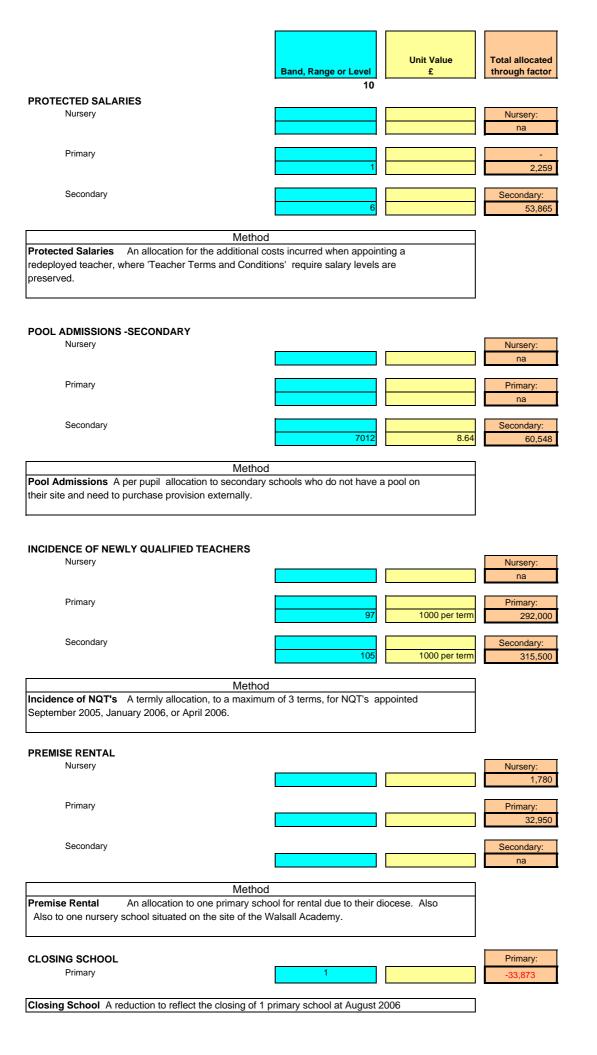
FREE SCHOOL MEALS

Nursery		Nursery:
	0.00	-
Primary		
· ····· ··· ,		Primary:
	3964 290.58	
Secondary		
		Secondary:
	2287 294.2°	672.863

Method

Free School Meals The total number of free meals taken as recorded on school census multiplied by a weighted unit of resource.

Primary weighting - 1.00 Secondary weighting - 1.0125





Total allocated through factor

11

BUDGET ADJUSTMENTS

PRIOR YEAR ADJUSTMENTS

RETROSPECTIVE PUPIL NUMBER ADJUSTMENT

Nursery: -12,964 Primary: -80,581 Secondary: -312,480

Method

Retrospective Pupil Number Adjustment for 2005/2006

An adjustment to a school's budget share following comparison of their estimated September 2005 pupils to their actual pupil count at the same date. As the total reduction to budget shares exceeded the amount of increases, the balance of funds remaining,

STATEMENTING ADJUSTMENT FOR 2005/2006

Method

Statementing Adjustment for 2005/2006

A reconciliation of hours provided for in budget shares for 2005/2006 compared to the actual number of hours provision met by a school. Using the unit of resource within 2005 Section 52, additional or a reduction in funding is calculated for each school.

ABATEMENT OF SECONDARY (11-16) FUNDING arising from operation of the LEA's formula

Secondary:

Method

Abatement of 11-16 funding - Calculate each school's percentage of post 16 pupils within their January 2006 census. The resultant percentage is applied as a deduction to all elements within their site specific and school specific allocations excluding Pe

MINIMUM FUNDING GUARANTEE

Nursery:	
67,168	
Primary:	
61,403	
Secondary:	
9,418	

Method

Minimum Funding Guarantee

The calculation used is that required by regulation and guarantees a minimum per pupil increase over 2005/06.

An **Adjusted 2005/2006 Budget** for each school is calculated by taking their Final Budget Share for 2005/2006 (calculated by adding budget share, incl MFG where applied, to redeterminations and all prior year adjustments and performance pay grant allocations as paid in 2005/2006) and deducting the following exclusions:

NQT funding; statementing; business rates

It is the calculated Adjusted Budget Share to which the guarantee percentage is applied, the resultant figure is a school's GFL - guaranteed funding level.

Each school's GFL then has added back into it the exclusions, having been uprated to reflect 2006 levels of funding. This is a school's Minimum Funding Gurantee.

A comparison is made between a school's Formula Share 2006/07 (excl.in secondary sector LSC pupil adjustments for 2005/06), and their MFG figure. A school's Budget Share 2006 is the higher of these two determined figures.



Total allocated through factor

Nursery, Primary and Secondary Schools

TOTAL OF FUNDING TREATED AS PUPIL-LED

Nursery: 1,491,662 Primary: 56,267,314 Secondary: 64,597,020

TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS

Nursery: 2,277,617 Primary: 69,877,956 Secondary: 75,247,789

	13
SPECIAL SCH	OOLS
PLACE-LED FU	JNDING

	Band, Range or Level Matrix Group A1 to A2	Unit Value £	Total allocated through factor
Difficulty Level		9,883	
	MLD	7,412	
	PD	9,883	
	SLD	0	
	PMLD	0	
	Matrix Group		
	B1 to B2		
Difficulty Level	EDB	18,210	
	MLD	13,504	
	PD	16,459	
	SLD	15,560	
	PMLD	15,560	
	В3		
	SLD/PMLD	18,505	
	B4		Special
	SLD/PMLD	20,374	6,677,885

Method

Matrix of Individual Need

A Matrix of Individual Need has been developed following a review of special education. The Matrix is the basis for identifying appropriate support & provision across our special schools and was used to support the place-led element of this years funding formula. The Matrix identifies seven groups, A1 to A3 and B1 to B4, each group reflecting an increasing level and complexity of need. It forms the funding basis for teaching and support staff. Some elements of inclusion and outreach are included in B1 to B4.

To ensure the funding model sensitively targets funding to individually defined needs, the funding ratios are calculated across both levels of difficulty and matrix groups, an example using teaching ratios is shown below.

Example of Matrix of Individual Need for teaching support ratios:

Matrix	Le	vel of Diffi	culty			
Group	EDB	MLD	PD	SLD	PMLD	
A1	1.6	1.8	1.7	0	0	
A2	1.6	1.8	1.6	0	0	
A3	1.5	1.8	1.6	0	0	
	1.6	1.8	1.6	0	0 A1	- A2 Median
B1	1.5	1.7	1.6	1.6	1.6	
B2	1.4	1.7	1.5	1.6	1.6	
	1.45	1.7	1.55	1.6	1.6 B1	- B2 Median
B3	0	0	0	1.6	1.6	B3 Median
B4	0	0	0	0	1.5	B4 Median

The calculated median ratios are used to arrive at the funding unit for each support area.

Band, Range or Level

Unit Value £ Total allocated through factor

PUPIL-LED FUNDING

Nurs.-6 7 - 14 15 +

1.0427
1.0000
1.1069

838.3722
804.0190
889.9652

Special 381,577

Method

Age Weighted Allocation

An allocation based on the number of pupils recorded on PLASC 2006. The allocation provides for Absence & other staff cover; lunchtime staff; support services; transport; learning resources and performance pay grant.

SOCIAL DEPRIVATION FACTORS

SOCIAL DEPRIVATION

172.50

182.45

Special 31,473

Method

Social Deprivation An allocation using the number of pupils eligible for free school meals as recorded on schools census data. The total number of eligible pupils is divided into the percentage of the ISB identified for this purpose. The resulting un

SITE SPECIFIC FORMULA FACTORS

PREMISES - BASE SUM

A 900-1210m B 1211-4000m C 4001m +

20,761 22,947 30,595

Special

Method

Premises - Base Sum An allocation to all schools, based on banded floor areas. The allocation recognises that some fixed costs remain the same or similar regardless of size.

PREMISE ALLOCATION

1.00

22.0552

Special 207,294

Method

Premise Allocation An allocation to all schools based on non weighted floor area for Primary, Secondary and Special schools, and a weighted floor area for Nursery schools. The allocation reflects the need to maintain school premises including utilities. Additional funding has been included to reflect higher than average inflation in energy costs.

SWIMMING POOLS

1 pool - closing 8/06 2 pools 3,678 8,827 Special 21,331

Method

Swimming pools A weighted unit of resource to all schools who have a pool on site. For pools in a special schools the allocation meets the costs of the emergency telephone, utility and pool maintenance expenditure.

The lump sum is weighted by 4.25

SWIMMING POOLS - CLEANING

2 pools + 1 pool to Aug 119.688 sq mt 870 31.43 p/sq mt

Special 5,864

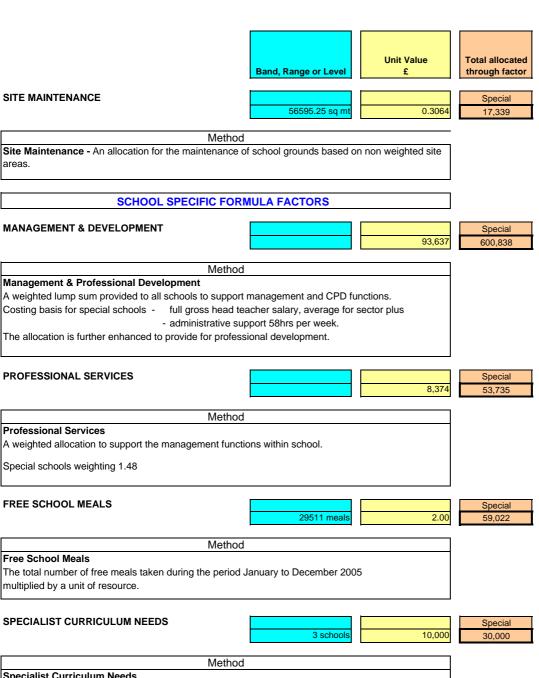
Method

Swimming Pools - Cleaning An allocation for schools with pools on site to meet associated additional costs - cleaning; pool chemicals; pool covers.

A single lump sum to all special schools with a learner pool.

In addition to lump sums all pools attract a weighted per surface area square metre allocation.

Special School pool weighting 1.50



SITE MAINTENANCE

MANAGEMENT & DEVELOPMENT

Costing basis for special schools -

PROFESSIONAL SERVICES

Special schools weighting 1.48

multiplied by a unit of resource.

Specialist Curriculum Needs

SPECIALIST CURRICULUM NEEDS

Professional Services

FREE SCHOOL MEALS

Free School Meals

2005/06.

Management & Professional Development

areas.

This newly introduced factor has been developed to provide funding for specific costs which are not easily defined using pupil or place numbers, or where meed is limited to specific

a) Specialist equipment The resourcing of PD/SLD/PMLD schools to meet the costs of purchasing and maintainence of specialist equipment, to include the health & safety training associated with such equipment.

BUDGET ADJUSTMENTS	
MINIMUM FUNDING GUARANTEE	Special
	11,151
Method	
Minimum Funding Guarantee	

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS

The calculation used is that required by regulation and guarantees a minimum per place increase over

8 240 380

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS

All Schools 155,643,742