

**MERTHYR TYDFIL COUNTY BOROUGH COUNCIL
PEOPLE & PERFORMANCE DIRECTORATE
LEARNING DEPARTMENT**

CONSULTATION QUESTIONNAIRE:

WEDNESDAY 11TH NOVEMBER 2020 – TUESDAY 2ND DECEMBER 2020

A. FORMULA FUNDING REVIEW

Name	:	_____
Position	:	_____
School	:	_____

Please note that only 1 response per school is required.

FORMUAL FUNDING REVIEW

In the Summer Term 2018 the Schools Forum was advised that Corporate Accountancy was to review the Formula Funding to school with an expected implementation date of 2020/2021

The aim of the review was to focus on a more equitable and fairer funding method. The revised Formula would be needs based, efficient and simple to understand and address any apparent funding inefficiencies for all schools

It was agreed in January 2020 to move the implementation date to April 2021

The consultation questions below highlight the key changes to the formula allocation including A. New indicators B. Amended indicators that have been allocated on a different basis and C. Unchanged indicators. The consultation also considers D. Transitional Arrangement

PLEASE ALSO REFER TO THE FOLLOWING SUPPORTING INFORMATION

Appendix 1 Formula Factor Descriptions

Where appropriate this includes further information regarding the formula factors

Appendix 2 Formula example

A NEW INDICATORS

1. HEADTEACHER LUMP SUM

A lump sum to fund a Headteacher at the top of the ISR of the individual school along with on costs. Amount varies depending on school.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

2. CLERICAL STAFF LUMP SUM

Primary - Each school receives funding for a Clerical staff member at top of Grade 3. Term time only

Secondary - Each school receives funding for 2 Clerical staff members at top of Grade 5. Term time only

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

3. CARETAKER LUMP SUM

Primary - Each school receives funding for a Caretaker at top of Grade 2.

Secondary - Each school receives funding for a Caretaker at top of Grade 5.

a) Do you support the above recommendation?

YES

NO

NO
STRONG
FEELING

b) Additional comments regarding the proposal?

4. MIDDAY SUPERVISOR

An allocation to fund 1 hour a day for midday supervision on a basis of 1 Supervisor for 50 pupils. An equivalent of £58.92 per pupil.

a) Do you support the above recommendation?

YES

NO

NO
STRONG
FEELING

b) Additional comments regarding the proposal?

5. TECHNICIANS

An allocation to fund Secondary school Technicians on a basis of 1 Technician per 300 pupils. An equivalent of £106.72 per pupil.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

6. FEDERATED SCHOOL ALLOWANCE

An allocation for Federated schools to fund an additional teacher on a leadership scale (£63,612), this is to recognise that there is only one Headteacher lump sum over the two schools

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

B. AMENDED INDICATORS – ALLOCATION BASIS CHANGED

7–10 AVERAGE TEACHERS SALARY CALCULATION

PUPIL TEACHER RATIO (PTR) NURSERY PUPILS	30:1
RECEPTION - YEAR 6 PUPILS	25:1
YEAR 7 - 9 PUPILS	21.5:1
YEAR 10 -11 PUPILS	17.5:1

PTR remain the same but Average Teacher salary calculation excludes Headteacher and TLR allowances

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

11. PUPIL NUMBER

This continues to fund all other pupil related expenditure not specifically stated in other indicators. In the Secondary sector this also includes an allowance for examination fees for Yr 11 pupils.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

12. ENERGY

Each school has been allocated a benchmarked typical energy usage per square metre (kWh/m²/year). This typical usage has been multiplied by the current rate per kWh multiplied by each schools m² floor area.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

13. CLEANING

An allocation to carry out cleaning. £12.61 per square metre of floor area based on current cleaning contract.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

14. SPLIT SITE ALLOWANCE

A unique allocation based on individual school circumstances when a school is on more than 1 site or the design of building means additional costs.

Additional funding includes lump sums for an additional teacher on a leadership scale where appropriate, additional clerical time, additional caretaker time and allocations for resources, building costs and car allowances.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

15. TEACHERS WORKLOAD

Teacher’s workload allocation is now distributed by pupil numbers.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

16. SWIMMING POOL

Allocation funded on annual operational costs associated with having a swimming pool

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

17. HUMAN RESOURCES SLA

This relates to the cost of providing a HR service to schools. Allocation based on the number of staff members (previously pupil numbers)

a) Do you support the above recommendation?

YES

NO

NO
STRONG
FEELING

b) Additional comments regarding the proposal?

18. SCHOOL COUNCIL FUNDING

An allowance of £400 per school to hold two school councils

a) Do you support the above recommendation?

YES

NO

NO
STRONG
FEELING

b) Additional comments regarding the proposal?

19. REPAIR & MAINTENANCE

An allocation of £3.70 per square metre of floor area to carry out repairs and maintenance based on historic spend over the last 3 financial years.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

20. MUTUAL FUND REPAIR & MAINTENANCE

An allocation for repair and maintenance which can be used to contribute to the mutual fund at each school's discretion. £4.78 per square metre of floor area based on ensuring same overall R&M funding provided to each sector.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

21.MAINTENANCE OF GROUNDS

An allocation for grounds maintenance of £0.20 per square metre based on historic spend over last three financial years.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

C. UNCHANGED ALLOCATIONS 22-41

All remaining allocations ref. 22-41 in Appendix 1 are unchanged, many of these have been reviewed within the last 3 – 5 years and approved by the Schools Forum. The conclusion of the review was for these to remain as they are currently.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

D. TRANSITIONAL ARRANGEMENT

The net impact of these changes to the Formula Allocation, whether an increase or decrease to the bottom line funding, will be tapered over a 3 year period with the full effect being realised in April 2023 i.e. 1/3 impact in 21/22, 2/3 impact in 22/23, and full impact in 23/24.

A transitional adjustment factor will be included in the Formula during 21/22 and 22/23 to ensure this tapering takes place.

a) Do you support the above recommendation?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>	NO STRONG FEELING	<input type="checkbox"/>
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b) Additional comments regarding the proposal?

PLEASE RETURN TO: Joanna Lewis, LMS & Resources Manager,
joanna.lewis@merthyr.gov.uk

APPENDIX 1 - FORMULA FACTOR DESCRIPTIONS

All figures are based on the 19/20 formula and will be inflated appropriately for the 21/22 formula allocation.

A. New Indicators

1. **Headteacher Lump Sum** - A lump sum to fund a Headteacher at the top of the ISR of the individual school along with on costs. Amount varies depending on school.

2. **Clerical Staff lump Sum** –

Primary - Each school receives funding for a Clerical staff member at top of Grade 3. Term Time only. £22,733 per school.

Secondary – Each school receives funding for 2 Clerical staff members at top of Grade 5. Term time only. £64,034 per school.

3. **Caretaker lump Sum** –

Primary - Each school receives funding for a Caretaker at top of Grade 2. £25,991 per school.

Secondary – Each school receives funding for a Caretaker at top of Grade 5. £36,130 per school.

4. **Midday Supervisor**– An allocation to fund 1 hour a day for midday supervision on a basis of 1 Supervisor for 50 pupils. An equivalent of £58.92 per pupil.

5. **Technicians** - An allocation to fund Secondary school Technicians on a basis of 1 Technician per 300 pupils. An equivalent of £106.72 per pupil.

6. **Federated Schools allowance** - An allocation for Federated schools to fund an additional teacher on a leadership scale, this is to recognise that there is only one Headteacher lump sum over the two schools. £63,612.

B. Amended Indicators – Allocation Basis Changed

7. **Pupil Teacher Ratio for Nursery age pupils 30:1** – A teacher funded on a ratio of 30:1, average teacher salary based on the current teacher population in MTCBC primary schools £50,091. An equivalent of £1,669.70 per nursery pupil. Average salary calculation excludes Headteacher and TLR allowances.

8. **Pupil Teacher Ratio (Reception to year 6) 25:1** – A teacher funded on a ratio of 25:1, average teacher salary based on the current teacher population in MTCBC primary schools £50,091. An equivalent of £2,003.64 per nursery pupil. Average salary calculation excludes Headteacher and TLR allowances.

9. **Pupil Teacher Ratio 21.5:1 (years 7-9)** – A teacher funded on a ratio of 21.5:1, average teacher salary based on the current teacher population in MTCBC secondary

schools £51,883. Equivalent to £2,413.16 per pupil. Average salary calculation excludes Headteacher and TLR allowances.

10. Pupil Teacher Ratio 17.5:1 (years 10-11) – A teacher funded on a ratio of 17.5:1, average teacher salary based on the current teacher population in MTCBC secondary schools £51,883. Equivalent to £2,964.74 per pupil. Average salary calculation excludes Headteacher and TLR allowances

11. Pupil Number funding

To fund all other pupil related expenditure not specifically stated in other indicators.

Primary - £142 funding per pupil.

Secondary – Year 7-10 - £480 per pupil and Year 11 £730 per pupil. Year 11 pupil figure is higher to include exam costs.

12. Energy – Each school has been allocated a benchmarked typical energy usage per square metre (kWh/m²/year). This typical usage has been multiplied by the current rate per kWh multiplied by each schools m² floor area.

13. Cleaning – An allocation to carry out cleaning. £12.61 per square metre of floor area based on current cleaning contract.

14. Split site allowance – A unique allocation based on individual school circumstances when a school is on more than 1 site or the design of building means additional costs. Funding includes lump sums for an additional teacher on a leadership scale where appropriate, additional clerical time and additional caretaker time. Allocations for resources, building costs and car allowances.

	Edwardsville Primary	Goetre Primary	Cyfarthfa Primary	Troedyrhiw Primary	Cyfarthfa High
Non-Teaching Staff allowance	25,046	25,046	50,091	25,046	0
Leadership allowance	6,760	6,760	13,521	13,521	0
Clerical staff to manage second office	11,473	11,473	22,945	22,945	22,945
Additional caretaker allowance	6,498	6,498	6,498	6,498	0
Additional resources for 2 offices	2,247	2,247	2,247	2,247	2,247
Additional Building costs	1,810	1,810	1,810	1,810	0
Other costs (resources, car allowances)	900	400	900	200	0
Total Split site allowance	54,734	54,234	98,012	72,267	25,192

15. Teachers Workload – The previous teacher’s workload allocation now distributed by pupil number. £133.68 per pupil.

16. Swimming Pool – Allocation funded on annual operational costs associated with having a swimming pool and only relates to Pen-Y-Dre High School. Costs assessed by

Sports Development Manager and include chemicals, cleaning, R&M, training and safety equipment. £11,082.

17. Human Resources SLA – This relates to the cost of providing a HR service to schools. Allocation based on the number of staff members. Service available at this cost under a SLA.

18. School Council Funding – £400 per school, to hold two school councils.

19. Repair & Maintenance – An allocation to carry out repair and maintenance. £3.70 per square metre of floor area based on historic spend over the last 3 financial years.

20. Mutual Fund Repair & Maintenance – An allocation for repair and maintenance which can be used to contribute to the mutual fund at each school’s discretion. £4.78 per square metre of floor area based on ensuring same overall R&M funding provided to each sector.

21. Maintenance of Grounds – An allocation for grounds maintenance £0.20 per square metre of grounds based on historic spend over the last 3 financial years.

C. Unchanged Indicators

22. Rates – Funded the actual amount for each school.

23. Welsh Language – In Welsh language schools work has to be translated from English text into the medium of Welsh. Additionally material has to be dispatched from the schools in both English and Welsh. Therefore, a lump sum is allocated to each Welsh school to provide for this.

24. Use of recreational facilities – Funding based on Allocation for year 5 and 6 pupils, cost of providing swim sessions plus transport if required.

25. Language Support – An amount is allocated per session where it has been determined that extra language support is required from an experienced language teacher. SEN PLASC data used.

26. Peripatetic Music – An amount is provided to all schools for peripatetic music provision. This is allocated for KS2, 3 and 4 pupil numbers based on a rate weighted to reflect the PTR and reflects additional preparation required for GCSE examinations.

Key Stage	PTR	Weighting	Funding per pupil
2	25 : 1	1	£37.72
3	21.5 : 1	1.2	£43.86
4	17.5 : 1	1.4	£53.89

27. Deprivation funding (Social Needs) - Deprivation funding allocated based on 3 year average of pupils residing in the 20% LSOA Wales (WIMD data).

Per Pupil Primary - £2.52

Per Pupil Secondary - £44.99

28. ALN funding (Social Needs) - ALN funding allocated based on 3 year average of January ALN PLASC Data.

Per Pupil Primary - £36.07

Per Pupil Secondary - £503.96

29. EAL (English as an additional language) – English as a second language, pupils in each school banded A-E. Each band weighted. Each pupil allocated an amount depending on band.

Band	Weight	Value
A	2 units	£720.75
B	1.5 units	£540.56
C	1 unit	£360.38
D	0.5 unit	£180.19

30. Surplus Places Adjustment – The allocations for Energy, Cleaning, Repairs and Maintenance is reduced for the surplus places in the school over and above 10% (allowable threshold) i.e. 15% surplus places results in a 5% reduction to these allocations.

31. Schools Meals SLA – This relates to an allocation using the weighted number of free school meals. The weighted number is calculated by multiplying the actual free meal entitlement number by the percentage uptake of free meals in each school in the previous calendar year. The weighted free meal number is multiplied by an indicative amount to provide a free school meal value.

32. Breakfast Club SLA – This relates to the Primary sector and is allocated on a proportional cost basis using the previous year's base.

33. Payroll SLA – This relates to the cost of providing a payroll service to schools. Allocation based on the number of staff members. Service available at this cost under a SLA.

34. Governing Body Support SLA – This relates to the cost of providing the service to schools. Allocation based on 30% lump sum and 70% pupil number. Service available at this cost under a SLA.

- 35. Financial Support SLA** – This relates to the cost of providing the service to schools. Allocation based on equal lump sum per school. Service available at this cost under a SLA.
- 36. Caretaking/Contracting SLA** – This relates to the cost of providing the service to schools. Allocation based on 75% lump sum and 25% Sq. metres. Service available at this cost under a SLA.
- 37. Property Services SLA** – This relates to the cost of dealing with delegated costs for building maintenance related issues. Allocation based on an amount per square metre. Service available at this cost under a SLA.
- 38. Creditors SLA** – This relates to the cost of providing a service to schools. Allocation based on an equal lump sum per school. Service available at this cost under a SLA.
- 39. Accountancy SLA** – This relates to the cost of providing a service to schools. Allocation based on an equal lump sum per school. Service available at this cost under a SLA.
- 40. Inclusion SLA** – This relates to costs of providing the non-statutory attendance/welfare & inclusion service under an SLA. It has been allocated on a lump sum and a per pupil basis.
- 41. Insurance SLA** - This relates to the cost of building insurance premiums and an allocation for liability insurance based on pupil numbers. Insurance cover available at this cost under a SLA.