

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

**CONSULTATION QUESTIONNAIRE:**

**WEDNESDAY 11<sup>TH</sup> NOVEMBER 2020 – TUESDAY 2<sup>ND</sup> DECEMBER 2020**

**A. SPECIAL SCHOOL FORMULA FUNDING REVIEW**

<b>Name</b>	:	_____
<b>Position</b>	:	_____
<b>School</b>	:	_____

*Please note that only 1 response per school is required.*

**SPECIAL SCHOOL FORMULA FUNDING REVIEW**

In the Summer Term 2018 the Schools Forum was advised that Corporate Accountancy was to review the Formula Funding to schools 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.

**PLEASE ALSO REFER TO THE FOLLOWING SUPPORTING INFORMATION**

Appendix 1 Special School Formula Factor Descriptions

## 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.

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. AVERAGE TEACHER SALARY

There is a minimum base funding for this indicator based on 165 pupils and the average banded level of need over the previous 3 financial years. This means a guaranteed 22.85 teachers funded. This baseline will be reviewed every 3 years. If actual pupil numbers/bandings are higher the number of teachers funded will increase.

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. CLERICAL STAFF / MANAGER LUMP SUM**

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?

**4. CARETAKER LUMP SUM**

School receives funding for a Caretaker at top of Grade 5.

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?

## 5. MIDDAY SUPERVISOR

An allocation to fund 1 hour a day for midday supervision on a basis of 1 Supervisor for 20 pupils. An equivalent of £147.30 per pupil.

a) Do you support the above recommendation?

YES

NO

NO  
STRONG  
FEELING

b) Additional comments regarding the proposal?

## 6. TEACHING ASSISTANTS

The TA allocation is based on a weighted TA salary cost, the bands of learning difficulty, and place numbers. There is a minimum base funding for this indicator based on 165 pupils and the average bandings over the previous 3 financial years. This means a guaranteed 63.34 TA's funded. This baseline will be reviewed every 3 years. If actual pupil numbers/bandings are higher the number of teaching assistants funded will increase.

a) Do you support the above recommendation?

YES

NO

NO  
STRONG  
FEELING

b) Additional comments regarding the proposal?

**B. AMENDED INDICATORS – ALLOCATION BASIS CHANGED**

**7. PUPIL NUMBER**

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

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?

**8. ENERGY**

Each school has been allocated a benchmarked typical energy usage per square metre (kWh/m<sup>2</sup>/year). This typical usage has been multiplied by the current rate per kWh multiplied by each schools m<sup>2</sup> 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?

## 9. 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?

## 10. TEACHERS WORKLOAD

Teacher's workload allocation now distributed by pupil number

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

### 12. SCHOOL COUNCIL FUNDING

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

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.REPAIR & MAINTENANCE**

An allocation to carry out Repair and Maintenance. £8.62 per square metre of floor area based on three year historic spend.

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.MUTUAL FUND REPAIR & MAINTENANCE**

An allocation for Repair and Maintenance of £4.78 per square metre which can be used to contribute to the mutual fund at the schools discretion

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.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?

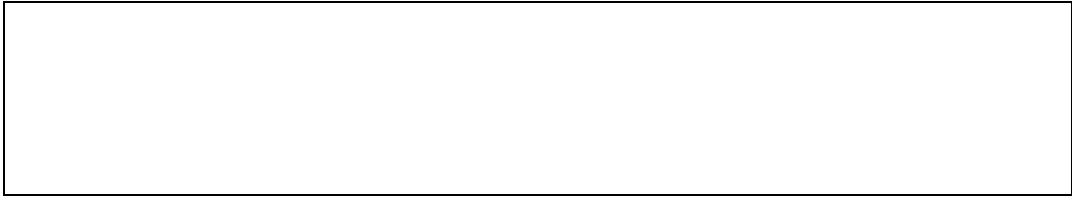
**C. UNCHANGED ALLOCATIONS 16-30**

All remaining allocations ref. 16-30 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?



PLEASE RETURN TO: Joanna Lewis, LMS & Resources Manager, [joanna.lewis@merthyr.gov.uk](mailto:joanna.lewis@merthyr.gov.uk)

## APPENDIX 1 – SPECIAL SCHOOL 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. **Average Teacher Salary** – The teaching allocation is based on the average teacher’s salary (ATS) excluding the Headteacher, the bands of learning difficulty, and place numbers. Funding per place is calculated by dividing the ATS by the number of pupil allocated per in each band.

BAND	Pupil to Teacher	165 Places	Teachers
	Ratio		Required
1	5	36.3	7.26
2	7	52.8	7.54
3	8	18.15	2.27
4	10	57.75	5.78
5			
<b>Total</b>		<b>165</b>	<b>22.85</b>

There is a minimum base funding for the indication based on 165 pupils and the average bandings over the previous 3 financial years. Meaning a guaranteed 22.85 teachers funded.

In each year if the actual pupil number and bandings determine further funding this will be made available, if actual pupil numbers and bandings determine less funding the 22.85 teachers will still be funded. This baseline will be reviewed every 3 years.

3. **Clerical Staff/Manager lump Sum** – Each school receives funding for 2 Clerical staff member at top of Grade 5. Term time only. £64,034 per school.
4. **Caretaker lump Sum** – Each school receives funding for a Caretaker at top of Grade 5. Full Time. £36,130 per school.
5. **Midday Supervisor**– An allocation to fund 1 hour a day for midday supervision on a basis of 1 Supervisor for 20 pupils. An equivalent of £147.30 per pupil.

6. **Teacher Assistant Ratio** – The TA allocation is based on a weighted TA salary cost, the bands of learning difficulty, and place numbers. The weighted salary is as follows:

Grade	Weighting
Grade 5 (mid-point) SCP 20	7.50%
Grade 4 (mid-point) SCP 15	25.00%
Grade 3 (mid-point) SCP 9	17.50%
Grade 2 (mid-point) SCP 6	50.00%

Funding per place is calculated by dividing the ATS by the number of pupils allocated per in each band.

BAND	Pupil to LSA	165 Places	TA
	Ratio		Required
1	1	36.3	36.30
2	3	52.8	17.60
3	6	18.15	3.03
4	9	57.75	6.42
5			0.00
Total		165	63.34

There is a minimum base funding for the indication based on 165 pupils and the average bandings over the previous 3 financial years. Meaning a guaranteed 63.34 TA's funded.

In each year if the actual pupil number and bandings determine further funding this will be made available, if actual pupil numbers and bandings determine less funding the 63.34 TA's will still be funded. This baseline will be reviewed every 3 years.

**B. Amended Indicators – Allocation Basis Changed**

7. **Pupil funding** - £206.86 per pupil. To fund all other pupil related expenditure not specifically stated in other indicators.
8. **Energy** – Each school has been allocated a benchmarked typical energy usage per square metre (kWh/m<sup>2</sup>/year). This typical usage has been multiplied by the current rate per kWh multiplied by each schools m<sup>2</sup> floor area.
9. **Cleaning** – An allocation to carry out cleaning. £12.61 per square metre of floor area based on current cleaning contract.

10. **Teachers Workload** – The previous teacher’s workload allocation now distributed by pupil number. £147.64 per pupil.

11. **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.

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

13. **Repair & Maintenance** – An allocation to carry out Repair and Maintenance. £8.62 per square metre of floor area based on three year historic spend.

14. **Mutual Fund Repair & Maintenance** – An allocation for Repair and Maintenance which is used to contribute to the mutual fund. £4.78 per square metre of floor area.

15. **Maintenance of Grounds** – An allocation of £0.20 per square metre is made for the maintenance of grounds/playing fields area based on three year historic spend.

### C. Unchanged Indicators

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

17. **Swimming Pool** – Allocation funded on additional costs associated with having a swimming pool.

18. **Peripatetic Music** – An amount is allocated for KS2, 3 and 4 pupil numbers based on a rate weighted to reflect the PTR in the mainstream

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

19. **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

20. **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.

21. **Breakfast Club SLA** – This relates to the Primary sector and is allocated on a proportional cost basis using the previous year's base.
22. **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.
23. **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.
24. **Financial Services 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.
25. **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.
26. **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.
27. **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.
28. **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.
29. **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.
30. **Insurance SLA** - This relates to the cost of building insurance premiums and an allocation for liability insurance based on pupil numbers.