

TABLE 4: FUNDING PERIOD 2 (2009-10)

Children, Schools and Families Financial Data Collection Table 4: Funding Factors

Year	2009-10	Local Authority Name	North Yorkshire	Local Authority Number	815	Email Address	judith.walls@northyorks.gov.uk
Contact	Judith C Walls	Tel No.	01609 532172	Version No.	2	Completion Date	15/06/2009

(1) Nursery, Primary and Secondary Schools

PUPIL COUNT ARRANGEMENTS (2)

Data regarding pupil numbers between Reception and Year 11 is taken from the January 2009 PLASC return. Pupils are counted in the

(3) Band, Range or Level	(4) Unit Value £	(5) Total allocated through factor	(6) % of Nursery, Primary & Secondary budgets
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AGE-WEIGHTED FUNDING (7)			Weighting Ratios (8)
Key Stage	School Year	Age group (pupils' ages as at 31st August 2009)	

Foundation Nursery	1.33
Pre-Reception	0.75
Foundation Main School	1.08
1	1.07
2	1.00
3	1.28
4	1.55

Re-takes (Year 12+) 0

Nursery	2,862
	1,617
	2,328
Primary:	2,290
	2,148
	2,747
	3,325
Secondary:	93,562,660
	102,417,119
	0
Secondary	0

Pupil numbers (9)	
	1,521.00
	59.30
	5,807.00
	11,461.00
	23,561.00
	20,343.00
	13,887.00

Method and worked example(s) where appropriate:
 The unit value is weighted to reflect different curriculum needs as shown in the table above.
 A school's individual age-weighted funding is calculated by multiplying the unit value by the number of pupils in that Key Stage.

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PRE-SCHOOL Place-Led Funding (Nursery Classes) (10)

Nursery 3 year olds	0	0
Nursery 4 year olds	0	0

Nursery:
0
Primary:
0

KS 1 ALTERNATIVE FUNDING ROUTES FROM 1/9/03 (i.e. not by AWPU) (11)

Class-based	0
Class-based	0
Ghost funding	0
Ghost funding	0

Nursery:
0
Primary:
0

Nursery:
0
Primary:
0

Difference in funding for pupils educated additionally at F.E colleges, work based learning providers or other providers of more practical learning options

0

0

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FUNDING OF SIXTH FORM PUPILS FROM LOCAL AUTHORITY FUNDS (12)

"Top-up"	0
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0

Secondary:
0

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OTHER PLACE-LED FUNDING TREATED AS PUPIL-LED such as in boarding units and hostels (13)

0	0	Nursery:
0	0	0
0	0	Primary:
0	0	0
0	0	Secondary:
0	0	0

LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS (14)

FTE Pupils (LSC Funded)	6,160	32,694,544
		Secondary:
		32,694,544

Method and worked example(s) where appropriate:
 Funding is allocated in accordance with the LSC's Demand Led Funding Formula (introduced 2008/09). This

AEN -Learning needs associated with EAL (15)

0	Nursery:
	0
98,302	Primary:
	98,302
25,730	Secondary:
	25,730

Method and worked example(s) where appropriate:
 Additional funding is allocated at £31 per pupil for whom English is their second language. Where the number of qualifying pupils exceeds 20% the school will be eligible for a lump sum payment of £36,999 in addition to the funding per pupil.

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AEN Identified Special Educational Needs (pupil led) (16)

SEN - pupils with or without statements (pupil-led) Named Pupil Individually Assigned Resources (17)

Nursery	Individual pupils - based on no hours in the statement of SEN			Nursery:
				14,737
Primary	Individual pupils - based on no hours in the statement of SEN			Primary:
				4,313,291
Secondary	Individual pupils - based on no hours in the statement of SEN			Secondary:
				3,225,439

SEN - pupils with or without statements (pupil-led) Other (18)

Nursery	Prior Attainment Eligibility to Free School Meals Index of Multiple Deprivation Turnover	Weighted Pupils		Nursery:
			19.88	
			71.65	
			23.27	
Primary	Prior Attainment Eligibility to Free School Meals Index of Multiple Deprivation Turnover		125.17	Primary:
		150,430	19.88	
		3,481	71.65	
		10,717	23.27	
Secondary	Prior Attainment Eligibility to Free School Meals Index of Multiple Deprivation Turnover		125.17	Secondary:
		1,990	23.86	
		120,747	101.83	
		2,359	27.58	
		8,709	263.25	3,727,976
		911		3,601,559

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Method and worked example(s) where appropriate:

Named Pupil Individually Assigned Resources: Based upon the hours of support allocated to individual children with high need low incidence special educational needs and in receipt of a Statement of SEN. Funding is allocated for the period the child attends the school, the rate of which is £536.91 per hour per year.

Prior Attainment: 80% of the resources. The number of children achieving below the county average is expressed as a percentage of the total pupils taking the tests. This information is averaged over a three year period. The average is put in one of ten bands which will determine the weighting to be applied to the pupils.

Deprivation: 20% of the resources.

Children eligible to free school meals 6.67% of the resources.

DETR Index of Multiple Deprivation 6.67% of the resources - using the PLASC data every pupil's home postcode is plotted against the DETR index of multiple deprivation which gives each pupil a score based upon the super output area in which they live. The scores for every pupil in each school are added together and then divided by the total number of pupils to give an average score per school. Additional resources are allocated to 25% of the total pupils based upon the schools with the highest average score.

Turbulence 6.67% of the resources - at the beginning of the academic year the number of pupils are counted in each school. Excluding the main admissions of pupils and the main leavers of pupils the number of pupils starting and leaving are counted each month during the academic year. If the number of pupils exceeds 10% or 10 pupils in Primary or 5% or 10 pupils in Secondary. The pupils over the threshold are funded at differential rates dependent upon the percentage turnover.

SEN - pupils with or without statements (place-led treated as pupil-led) Named Pupil Individually Assigned Resources (19)

Nursery	AEN AWPU		39.35	Nursery:	4,996
Primary	AEN AWPU		39.35	Primary:	1,653,365
Secondary	AEN AWPU		39.35	Secondary:	1,610,516

Method and worked example(s) where appropriate:

AEN is based upon 3.5% of the total delegated budget, 30% of which is distributed in relation to pupil numbers.

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SEN - pupils with or without statements (place-led treated as pupil-led) Other (20)

Nursery	Based on need (places)			Nursery:
	Based on age (places)			0
Primary	Based on need (places)	20	Dependent	Primary:
	Based on age (places)	20	upon need	255,833
Secondary	Based on need (places)	19	Dependent	Secondary:
	Based on age (places)	19	upon need	148,809

Method and worked example(s) where appropriate:

Funding to Resourced Provision within Primary and Secondary schools is made following an annual review of the required needs to make provision for children with a statement of special educational needs (SEN) weighted to reflect the varying levels of resourcing required for the different SEN provisions.

Category A - Profound and Multiple Learning

Pupils with profound and multiple learning difficulties are not a homogenous group. Pupils with profound and multiple learning difficulties, in some respect, appear to be functioning at the earliest levels of development and additionally may have physical or sensory impairments. Some of these pupils may be ambulant and may also behave in ways that either challenge staff and other pupils or result in their isolation, making it difficult to involve them in positive educational experiences. Most experience difficulties with communication.

Category B - Severe Physical and Medical Disability

Severe physical disability and medical need significantly requiring high levels of intervention including a need for daily adult assistance with mobility, medication and learning and regular therapy input.

Category C - Severe Communications Difficulties

The ability of children with such difficulties to profit from the spoken or written word or understand their environment can be enhanced considerably through specialised teaching. Their severe problems in communication are likely to reflect speech and language disorders in themselves, in some instances, though they are secondary to other characteristics; for example, to sensory impairment or physical disability.

Category D - Severe Emotional and Behavioural Difficulties

These pupils need specialised help in adapting constructively to the more stressful of their circumstances and in managing associated feelings of frustration anger and fear. They are often educated in special schools or mainstream resourced provision, though some receive help in ordinary schools.

Category E - Severe Developmental Difficulties

The majority of these pupils have marked limitations in learning across all aspects of their development, though some may show particular disabilities or relative assets in some areas.

Category F - Other Learning Difficulties

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The learning difficulties of many of these pupils may be attributed to slow cognitive development, compounded in some cases by sensory impairment or physical disability. Traditionally they have often attended schools for those with moderate learning difficulties, though increasingly they receive special help in ordinary schools. This band however also includes pupils who, against a background of otherwise normal development, experience learning difficulties specific to one area of the curriculum. It also includes pupils who display emotional and behavioural difficulties related to their frustration at their difficulty in learning.

Pupil Led Funding

In addition to place led funding, funding is allocated to the anticipated age profile of the Resourced Provision. The age supplements are the same regardless of the type of place planned in the school and the allocation is on the basis of planned places not actual pupil numbers. The age of the pupils is derived from an audit undertaken during the Autumn term in the previous financial year.

AEN - Identified Special Educational Needs (not pupil led) (21)

Nursery:
0
Primary:
0
Secondary:
0

AEN - Other Learning Needs (22)

Nursery:
0
Primary:
2,105,878
Secondary:
2,904,362

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AEN - Social Needs (23)

Nursery	UID Weighted	2,550
	UID Targetted	0
Primary	UID Weighted	2,790,720
	UID Targetted	1,149,245
Secondary	UID Weighted	2,684,503
	UID Targetted	1,073,794

Nursery:
2,550
Primary:
3,939,965
Secondary:
3,758,298

Method and worked example(s) where appropriate:

Personalised Learning: Prior Attainment funding has been allocated based on the number of children in each school achieving below the national average at Foundation and Key Stage 1 for Primary and Key Stage 2 for Secondary. For Primary, the number of children have been weighted to take into account the different number of curriculum years taught in schools. Deprivation funding is based on the number of children eligible for Free School Meals as at January 2009 PLASC. Special and Middle Schools are funded at the appropriate rates for children taught in the schools. Element now included in the AWPU.

Turnover inc Service Factor: at the beginning of the academic year the number of pupils are counted in each school. Excluding the main admissions and leavers, the number of pupils starting and leaving are counted each month during the academic year. If the number of pupils exceeds 10% or 10 pupils in Primary or 5% or 10 pupils in Secondary, the pupils over the threshold are funded.

UID Weighted and Targetted: 80% of the total delegated budget for AEN is distributed by reference to the Universal Index of Deprivation. 50% is weighted and applied to all schools. 30% is applied to those schools in the highest quartile.

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Site - Specific Factors (including pupil-led) (24)

Level	Factor	Category	Value	Total
Nursery	Rates	Actual	5,276.17	Nursery: 39,459
	Rents	Actual	0.00	
	Insurance	Various	2,353.50	
	Floor Area	Actual	31,829.39	
Primary	Rates	Actual	1,039,875.68	Primary: 9,909,978
	Rents	Actual	235,164.08	
	Insurance	Various	538,579.14	
	Floor Area	Actual	8,096,358.64	
Secondary	Rates	Actual	2,156,712.21	Secondary: 11,812,160
	Rents	Actual	149,456.89	
	Insurance	Various	715,890.65	
	Floor Area	Actual	8,790,100.45	

Method and worked example(s) where appropriate:

Rates: An amount per pupil is allocated via AWPU with the balance made up in the School Specific Lump Sum.
Rents: Where a school is required to rent or lease facilities to enable it to fully deliver the curriculum the cost of using such facilities is funded £ for £.
Insurance: Funding is allocated to enable schools to purchase appropriate insurance cover for Employers Liability and other costs (based on the previous year's CFR employee costs), Fire insurance (based on the value of the school premises) and Engineering insurance (based on pupil numbers).
Floor Area Funding: general premises funding is allocated to schools by reference to a school size related lump sum (Primary £5,268 and Secondary £10,535) plus an amount per m², £32.11 primary and £28.36 secondary.
The non-AWPU deduction is no longer a separate factor within the new LMS formula. The adjustment is now made as part of the premises funding calculation. Secondary schools with sixth forms are allocated funding based upon their cleaning floor area which has been adjusted by dividing their total cleaning floor area by their total number of pupils and then multiplying by their number of pre-sixteen pupils.

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School-Specific Factors (including pupil led) (25)

Level	Factor	Value	Total
Nursery	School Size Lump Sum	168,726.43	Nursery: 168,726
	Free School Meals	0.00	
	Discounted Meals	0.00	
	Other School Meal Funding	0.00	
Primary	School Size Lump Sum	12,256,946.86	Primary: 14,582,102
	Free School Meals	1,060,287.17	
	Discounted Meals	76,831.17	
	Other School Meal Funding	1,188,036.46	
Secondary	School Size Lump Sum	4,201,633.91	Secondary: 5,102,366
	Free School Meals	541,864.00	
	Discounted Meals	0.00	
	Other School Meal Funding	358,868.05	

Method and worked example(s) where appropriate:

School Size Lump Sum: The Nursery lump sum no longer exists under the revised funding formula - see Transitional Funding notes. Primary - the number of pupils in reception to year 6 are used to determine the size of school for allocating the lump sum which takes account of fixed overheads and to protect curriculum delivery. Secondary - the number of pupils in years 7-11 are used in the same way. Where a school does not teach 5 curriculum years in the 7-11 years range the lump sum is reduced to reflect the number of year groups taught. For both Primary and Secondary schools the lump sum covers teaching and non-teaching staff, traded services, premises and ICT and non-ICT learning resources.

Free School Meals: The number of free school meals taken in the previous academic year is multiplied by the price of the meal.

Discounted Meals: The costs of a school meal is discounted by 20p per meal for siblings within the same school.

Other School Meal Funding: Catering energy - a lump sum is allocated based upon the size of the school and whether it produces school meals. The remaining funding is allocated based upon the number of meals produced multiplied by an amount per meal. School meals waste and equipment - is only allocated to Primary schools based upon the number of meals produced multiplied by an amount per pupil.

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BUDGET ADJUSTMENTS (26)

TRANSITIONAL PROVISION (27)

Nursery:	51,267
Primary:	130,378
Secondary:	77,917

Method and worked example(s) where appropriate:

Transitional Funding Arrangements for the implementation of the new mainstream LMS Formula

The calculation of transitional funding is a "one off" calculation based upon the 2009-2010 financial year budget we have calculated what your school will receive under the new LMS Formula and compared it to what your school would have received under the old LMS formula including the Minimum Funding Guarantee. The difference between the two figures will be the 'Transitional Funding' amount. This is then multiplied by the agreed percentage for each year e.g. for 2009-2010 80%. 2009-10 protection is 80%.

The transitional funding for Early Years will compare the new Early Years Formula allocation with the old Early Years Formula allocation including MFG for the last time and the difference between the two figures will be the 'Transitional Funding' amount. This is then multiplied by the agreed percentage for each year e.g. for 2009-2010 80%. Transitional funding for Early Years is limited to three years but will follow the same percentages as above for the period 2009-2012.

ABATEMENT OF Secondary (11-16) FUNDING arising from operation of the LA's formula (28)

Secondary:	0
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Method and worked example(s) where appropriate:

The non-AWPU deduction is no longer a separate factor within the new LMS formula. The adjustment is now made as part of the premises funding calculation. Secondary schools with sixth forms are allocated funding based upon their cleaning floor area which has been adjusted by dividing their total cleaning floor area by their total number of pupils and then multiplying by their number of pre-sixteen pupils.

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MINIMUM FUNDING GUARANTEE (29)

Nursery:
0
Primary:
0
Secondary:
0

Method and worked example(s) where appropriate:
 The Minimum Funding Guarantee is calculated by reference to regulation 18 schedule 5 of the financing of Maintained Schools Regulations.

TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (30)

Nursery:
649,840
Primary:
134,294,465
Secondary:
167,378,818

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SPECIAL SCHOOLS (31)

PLACE-LED FUNDING (32)

Category A* Places	2	38,953
Category A Places	38	19,491
Category B Places	39	17,157
Category C Places	51	14,763
Category D Places	211	11,238
Category E Places	245	9,977
Category F Places	201	9,562

Special
8,489,210

Method and worked example(s) where appropriate:
 The primary and secondary needs of individual children are assessed (using the DCSF indicators of need) initially on cognitive difficulties and then additional needs against a matrix of need to determine the overall level of need of an individual special school and also the level of funding to be allocated to the schools.

PUPIL-LED FUNDING (33)

Under 6 age profile	75	1,456
7 to 11 age profile	166	803
12 to 14 age profile	245	125
15 to 16 age profile	202	838
Post 16 age profile	99	708

Special
477,236

Method and worked example(s) where appropriate:
 In addition to place led funding, funding is allocated to the anticipated age profile of the Resourced Provision. The age supplements are the same regardless of the type of place planned in the school and the allocation is on the basis of planned places not actual pupil numbers. The age of the pupils is derived from an audit undertaken during the Autumn term in the previous financial year.

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AEN - LEARNING NEEDS ASSOCIATED WITH EAL (34)

		Special
		0

AEN - SOCIAL NEED (35)

		Special
		0

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SITE - SPECIFIC FACTORS (Including pupil-led) (36)

Structural Repairs and Maintenance	Various	163,494.00
Day to day premises	Various	515,820.54
Grounds Maintenance	Various	62,532.00
Fuel and Water	adj floor area	198,210.85
Swimming Pool	per metre sq	26,822.25
Rents	actuals	41,902.00
Insurances	Various	48,086.44

Special	1,056,868
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Method and worked example(s) where appropriate:

Structural Repairs & Maintenance - Schools are allocated a flat rate lump sum; Day schools £3,650; Residential schools £14,600; an element of the funding is allocated via the Place value £98.72 and the remaining funding is allocated by reference to the floor area £3.45. The allocation is weighted for recently built schools.

Day to Day Maintenance - an element of the funding is allocated via the Place value £285.26 and the remaining funding is allocated based upon the cleaning floor area of the school £27.26.

Grounds Maintenance - an element of the funding is allocated via the Place value £18.33. The remaining funding is allocated by reference to the field & surrounds areas.

Energy - the floor area of the school is weighted for the age of the building and the type of fuel used. The funding is then allocated via the Place value £282.01 and the remaining allocated by reference to the adjusted floor areas at £8.67.

Swimming Pool - the funding is allocated by reference to whether it is an indoor or outdoor swimming pool and then based upon the size of the swimming pool.

Rents - where a school is required to rent or lease facilities to enable it to fully deliver the curriculum the cost of using such facilities will be fully funded via the LMS formula.

Insurances - funding is allocated to schools to enable them to purchase the appropriate insurance cover as follows:

- Employers liability and other costs - previous years CFR employee costs
- Fire insurance - value of school premises

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SCHOOL - SPECIFIC FACTORS (Including pupil-led) (37)

School Size Related Lump Sum		331,107.08
Boarding		1,757,582.63
Non Residential Free School Meals		40,544.00
Non Residential School Meals		15,054.61
Residential Catering		317,988.00
Mini Bus Allocation		45,553.00
Personalised Learning		273,092.15
Dual Placement Funding		199,068.00
EBD Schools Additional Factor		112,183.83

Special
3,092,173

Method and worked example(s) where appropriate:
<p>Special School Lump Sum - the number of places are used to determine the size of school for allocating the lump sum which takes account of fixed overheads and to protect curriculum delivery.</p> <p>Residential place allocations - Schools that provide residential accommodation are allocated additional resources to provide for the "boarding " aspects of the school. The lump sum is calculated by taking the number of planned residential places weighted to reflect the need of the pupils and then multiplied by £5,703.</p> <p>Residential School catering arrangements - due to the nature of residential schools the funding for catering in these schools is reflected in a separate lump sum allocation. For this purpose a residential place is valued at 4 units and a day place valued at 1 unit. The total calculated units are then multiplied by £484.</p> <p>Minibus allocations - a lump sum per school is allocated to assist with the provision of a minibus. The value of this is higher for residential schools to reflect the additional weekend usage.</p> <p>EBD School additional factor - a 10% add-on to the place led funding is allocated to the LEA's two EBD Schools to reflect the increasing difficulties faced by such schools</p> <p>Dual Placements - With the exception of the LEA's two EBD schools the purchased places are weighted to reflect the potential of pupils experiencing dual placements in mainstream schools and then multiplied by an amount per weighted place.</p> <p>Free School Meal Funding - The number of free school meals in the last academic year is multiplied by the average cost of a meal.</p> <p>Catering energy - A lump sum is allocated based upon the size of the school and whether it produces school meals. The remaining funding is allocated based upon the number of meals produced multiplied by an amount per meal.</p> <p>School meals waste and equipment - is only allocated to Primary schools based upon the number of meals produced, multiplied by an amount per pupil.</p>

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BUDGET ADJUSTMENTS e.g transitional provision (38)

Special
0

MINIMUM FUNDING GUARANTEE (39)

Special
140,521

Method and worked example(s) where appropriate:
 The Minimum Funding Guarantee is calculated by reference to regulation 18 schedule 5 of the Financing of Maintained Schools Regulations.

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (40)

Special
13,256,009

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (41)

All Schools
315,579,132