

Table 3

The LEA's Allocation Formula

SECTION 52 EDUCATION BUDGET STATEMENT

Table 3 - Funding Factors

YEAR :2002-03

LEA: Waltham Forest

LEA No. 320

INDIVIDUAL SCHOOLS BUDGET - FUNDING FACTORS

PRIMARY AND SECONDARY SCHOOLS

Pupil Count Arrangements

PLASC counts with the addition of the anticipated 4+ pupils from the headteachers' waiting list. Adjustments are made in the current year if the actual figures differ from the budget rolls.

Pupil-Led Funding

AGE-WEIGHTED FUNDING

Factor Name	Level	Unit Value £	Pupil Nos	Funds Allocated £000	% of primary and secondary schools budgets	FMS reg.
Age Weighted Funding Weighting ratios						
1.603	Nursery	2,628.55	1,520	3,995,400		Reg. 11
1.025	4+	1,680.60	2,878	4,836,768		
1.000	5+	1,639.99	2,832	4,644,438		
1.000	6+	1,639.99	2,815	4,616,558		
1.037	7+	1,700.08	2,851	4,846,916		
1.037	8+	1,700.08	2,917	4,959,121		
1.037	9+	1,700.08	2,853	4,850,316		
1.037	10+	1,700.08	2,949	5,013,523		
1.430	11+	2,344.90	2,012	4,717,942		
1.430	12+	2,344.90	2,029	4,757,805		
1.430	13+	2,344.90	1,985	4,654,629		
1.482	14+	2,431.17	1,835	4,461,206		
1.482	15+	2,431.17	1,794	4,361,528		
Primary			21,615	37,763,040		
Secondary			9,655	22,953,110		
Total			31,270	60,716,149	65.29%	
Method of pupil count is PLASC return + estimated reception intake.						

PUPIL-LED SEN FUNDING

Factor Name	Pupil Numbers	Funding per pupil £	Funds Allocated £	% of primary and secondary schools budgets	FMS Regs
Pupils with statements					
Level A	38	0	0		Schd.2 Reg 16 .1
Level B	310	3,912	1,210,764		
Level C	155	5,292	819,819		
Level D	56	6,696	374,976		
Level E	28	9,528	265,990		
Primary	312		1,352,613		
Secondary	274		1,133,783		
Total	586		2,486,396	2.67%	

Pupils with statements are funded with an additional weighted allocation based on their level of need as determined by the LEA's resource ladder. Where pupils will be leaving the school within the financial year a proportional allocation is made.

The difference of £185,153 between Funds Allocated and the total represents those funds allocated to sixth form pupils

Factor Name	Pupil Numbers	Funding per pupil £	Funds Allocated £	% of primary and secondary schools budgets	FMS Regs
Pupils without statements					
Mobility	2,239		291,360		Schd. 2 Reg 16 .3 Reg 16 .2 Reg 16 .17 Reg 16 .23 Reg 16 .1
Prior Attainment	6,400		1,093,934		
Free school meals	9,488		579,851		
Emag	8,890		546,756		
SEN audit pupils A3	1,769		837,883		
Primary	14,447		2,259,207		
Secondary	14,339		1,090,576		
Total	28,786		3,349,784	3.60%	

Pupils without statements are funded through five elements.

(1) Mobility: Funding is based on movement of pupils between schools.

(2) Prior Attainment :Funding allocated based upon pupil performance at Baseline Assessment and Key Stage 1, Key Stage 2 and Key stage 3 tests.

(3) Free school meals: Funding allocated based on free meals data, ie pupils eligible for free school meals.

(4) EMAG top-up: Funding is allocated based upon pupil performance of minority ethnic groups at Key Stage 1, Key Stage 2 and Key Stage 3 tests. The number of Ethnic Minority pupils was used in allocating funding at Key Stage 1.

(5) SEN audit pupils A3: Funding allocated on pupils who are under assesment or awaiting assesment for special needs.

OTHER PUPIL-LED FUNDING

Factor Name	Numbers	Rate £	Funds Allocated £	FMS Regs
Repair And Maintenance	31,270	58.465	1,828,211	Reg 11
Totals		Primary Secondary Total	1,263,359 564,852 1,828,211	1.97%

Repair & Maintenance

Funds are allocated to school to cover the premises cost. This portion of the premises funding is allocated to schools on pupil no.s

SITE SPECIFIC FACTORS

Funding Factor	Description of Unit of Measurement / Method of Allocating Funds	Number of Units	Rate	Funds Allocated £	% of Total Budget	FMS reg.
Split Site and Rent	Schools operating on two or more sites apart receive an allowance depending on the sector and schools also receive an allocation for rent/lease for mobiles and sites.			130,739		Schd. 2 Reg 16.6
Other Premises Cost	Schools receive an allowance of £7.958 per Square Meter to cover Cleaning, Fuel, Caretaking and other Repair work. Adjustments were made depending upon the condition of school buildings.	225,729	7.958	1,796,502		Schd. 2 Reg 16.5 & 16.9
Rates	Schools receive an estimate of their rates bill.			1,772,449		Schd. 2 Reg 16.8
Ground Maintenance	Schools receive the costs of existing contracts; schools not in a contract receive an estimate for the contract price for the site.			186,087		Schd. 2 Reg 16.5
Total Site Specific Factors	Total			3,885,778		
	Primary			2,214,244		
	Secondary			1,671,534		

SCHOOL SPECIFIC FACTORS

Management Cost (Primary)	All primary schools are allocated £57,533 for the administration of the school.	65	57,533	3,739,645		Schd. 2 Reg 16.22
Management Cost (Secondary)	All secondary schools are allocated £100,000 for the administration of the school.	14	100,000	1,400,000		Schd. 2 Reg 16.22
Emotional Behavioural Difficulties	Two schools receive allocation for children with Emotional Behavioural Difficulties (EBD)	2		150,000		Schd. 2 Reg 16.23

Small Schools Protection	Infant Schools with pupil numbers below 180 and primary schools with pupil numbers below 210 get additional funding of £1200 for additional pupil to reach the 180 and 210 margin. Additional funding for secondary pupils of £500 per pupil is added for pupi			905,200		Sec. 25
Budget Support Grant	Primary schools with more than 35% free school meal of KS2 pupils receive funding based on their school meals eligibility percentage.			231,000		Schd. 2 Reg 16. 23
School Meals	85% of the budgets delegated on the basis of free meals eligibility and 15% on flat cash base. School meals have now been delegated to all schools.			2,691,012		Schd. 2 Reg 16. 23
Transport	Primary schools whose pupils have to travel significant distances to sports facilities receive an allocation of £28.18 for ages nine and ten and in secondary schools £20.45 per pupil.			247,179		Sched 2 Reg. 16 11
Total School Specific Factors	Total			9,364,036		
	Primary			6,280,218		
	Secondary			3,083,818		

Total Primary and Secondary Funds Allocated For Other Factors	Primary	8,494,463		
	Secondary	4,755,351		
	Total	13,249,814		

TRANSITIONAL FUNDING	This year, the scheme for financing schools has changed. Schools that gained more than 2.5% were top-sliced while other schools were protected so that they do not lose more than 2.2%	Primary	171,804		
		Secondary	150,436		Reg 2.1
		Total	322,240		

NON LSC FUNDING	Pupil Led	7,605,890	8.2%	Reg 17.1
	Non - Pupil - Led	1,299,078		
	Total	8,904,968		

SIXTH FORM FUNDING	From LSC (Pupil LED)	2,374,454	2.6%	Reg 17.1
	From LEA (Non Pupil Led)	-		
	Total	2,374,454		

ABATEMENT FROM SIXTH FORM FUNDING	Pupil LED	- 162,217	-0.2%	Reg 17.3
	Non Pupil Led	- 206,474		
	Total	- 368,691		

TOTAL FUNDS FOR SIXTH FORM SCHOOLS	Pupil LED	9,818,127	10.6%	
	Non Pupil Led	1,092,604		
	Total	10,910,731		

TOTAL PUPIL LED FUNDING	Primary	42,638,219	45.9%	
	Secondary	35,560,448	38.3%	
	Total	78,198,667	84.1%	

TRANSITIONAL FUNDING - FORMER EX GM SCHOOLS	Primary	-		
	Secondary	-		
	Total	-		

UNALLOCATED RESERVES	Primary	-		
	Secondary	67,328		
	Total	67,328		

SCHOOLS STANDARDS GRANT	Primary	1,632,200		
	Secondary	1,186,600		
	Total	2,818,800		

GRAND TOTAL	Primary	52,936,654		
	Secondary	42,812,785		
	Total	95,749,439		

Total funds excluding Transitional Funding and SSG	92,930,639		
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SPECIAL SCHOOLS**PLACE-LED FUNDING**

Resource Level	Place Numbers	Funds Allocated per Place £	Funds Allocated £
B	72	6,063	436,537
C	138	7,493	1,034,048
D	168	9,094	1,527,728
E	184	11,669	2,147,102
F	76	16,233	1,233,691
G	71	19,810	1,406,520
Place Led Funding Total	709		7,785,626

PUPIL-LED FUNDING

Age Group	Pupil Numbers	Funding Per Pupil £	Funds Allocated £
Nursery	22	460	10,112
4+	24	431	10,342
5+	39	428	16,676
6+	41	429	17,599
7+	50	655	32,752
8+	57	657	37,432
9+	57	738	42,087
10+	51	739	37,684
11+	58	564	32,721
12+	50	567	28,374
13+	46	564	25,955
14+	46	616	28,328
15+	53	992	52,569
16+	37	802	29,691
17+	31	952	29,526
18+	20	960	19,195
Pupil-Led Funding Total	682		451,043

Total Allocated Place and Pupil Led			8,236,669
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SPECIAL SCHOOLS

SITE SPECIFIC FACTORS

Funding Factor	Description of Unit of Measurement / Method of Allocating Funds	No. of Units	Rate	Funds Allocated £	Funds Allocated	% of Total Budget	FMS reg.
Caretaking	Schools allocated lump sum based on floor area. 2750sq metres = 2 units; under 2750sq metres = 1 unit	8	21,120	168,960			Sched. 2.27
Repair & Maintenance	Schools receive an allowance per square Metre for places and floor elements.			54,948			Sched. 2.6
Cleaning	Schools receive an amount based on the non-catering cleaning area; floor type, and sector use.			159,537			Sched. 2.13
Council Tax	Schools with resident caretakers receive an amount to cover the cost of Council Tax.			3,202			Sched. 2.9
Fuel	Schools receive an amount based on the floor space area of their school. The floor space has been weighted according to the proportion of teaching areas with ceiling heights above 4 metres			131,325			Sched. 2.11
New delegation 99/00	In 1999/00 the LEA delegated funds for a range of services. The pupil led element is now included in the AWPU. This remaining amount represents the non pupil led element.			136,378			Sched. 2.26
Ground Maintenance and Rent	Schools receive the costs of existing contracts; Schools not in a contract receive an estimate for the contract price for the site. In addition, schools receive an allocation for rent/lease for mobiles and sites.			19,779			Sched. 2.27

TOTAL SITE SPECIFIC				674,129			
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SCHOOL SPECIFIC FACTORS

Funding Factor	Description of Unit of Measurement / Method of Allocating Funds	No. of Units	Rate	Funds Allocated £	Funds Allocated	% of Total Budget	FMS reg.
Headteacher's salary	Schools are allocated cost at mid-point of scale appropriate to school group size.	5	varies	325,840			Sched. 2.21
Curriculum Protection	Schools with secondary aged pupils receive a top up to ensure the delivery of the National Curriculum	3.4	35,107	119,364			Sched. 2.28
Supply Cover	Schools are allocated lump sum based on size school: 200+pupils= 2 units; under 200 pupils 1 unit.	7	35,107	245,749			Sched. 2.27
EMAG top up	A lump sum of £2000 per Special School. Each ethnic group in each key stage is weighted by the extent to which that group's attainment varies from the borough average.			18,548			Shed.2
School Meals	85% of the budgets delegated on the basis of free meals eligibility and 15% on flat cash base.School meals have now been delegated to all schools.			131,394			Sched. 2.27
Mandatory Allowance	Schools are allocated the extra costs of qualified teachers of the deaf/blind who are entitled to additional allowance.			58,656			Sched. 2.26
Specialist Equipment	Schools receive an allocation for their specialist equipment needs.			10,541			Sched. 2.26
Residential Funding	One school receives funding for residential lettings for out-borough pupils. The boroughs concerned will be invoiced to recover the money.			191,000			

Funding Factor	Description of Unit of Measurement / Method of Allocating Funds	No. of Units	Rate	Funds Allocated £	Funds Allocated	% of Total Budget	FMS reg.
Peripatetic Support Teams	Schools receive funding for peripatetic support services delegated to them. This is based on a formula relating to the number of teachers in each team plus support.	14	varies	562,424			Sched. 2.26
TOTAL SCHOOL SPECIFIC				1,663,516			
Total Non - Pupil Led Funds (Special)				2,337,645			
Transitional funding for Special Schools which were Grant Maintained				167,745			
Unallocated Reserve Special Schools				-			
School Standard Grant				148,200			
Total Funds Special Schools				10,890,261			
Total Funds Available to All Schools (ISB)				106,639,700			