



Appendix 1

MONMOUTHSHIRE LOCAL EDUCATION AUTHORITY

CHILDREN AND YOUNG PEOPLE DIRECTORATE

CONSULTATION DOCUMENT – FUNDING FORMULA.

- This document forms part of the consultation process on the proposed changes to the funding formula, which delegates funding to schools within Monmouthshire.
- The relevant Welsh Government legislation that Monmouthshire Local Education Authority is bound by is:

The Schools Budget Share (Wales) Regulations 2010.

CONSULTATION DOCUMENT

PROPOSED CHANGES TO SCHOOLS FUNDING FORMULA TO FUND KING HENRY VIII 3 – 19 SCHOOL.

Date of Issue: **12th September 2023**

Action Required: **Consultation closes noon on the 24th October 2023.**

Title of Document: The Review of Funding for Schools in Monmouthshire to fund King Henry VIII 3 – 19 School Consultation Document.

Audience: All Head teachers of Monmouthshire Schools, Chairs of Governing Bodies of Monmouthshire Schools, The Schools Budget Forum, the Senior Leadership Team, the Departmental Management Team of the Children and Young People Directorate, Diocesan Directors of Education and All Elected Members.

Overview: This document details the reasons for the review of the current consultation on Schools funding and outlines the new proposals for the distribution of this funding.

Action Required: A proforma (Appendix 1) is enclosed for your response. The completed form should be sent to the address below by the consultation closing date of **noon on the 24th October 2023.**

Responses to: Nikki Wellington
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Children and Young People Directorate
Monmouthshire County Council
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Further Information: Enquiries about this consultation document should be directed to **Nikki Wellington**

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Additional Copies: These can be obtained from Nikki Wellington (telephone number and e-mail address above)

Related Documents: The Schools Budget Shares (Wales) Regulations 2010

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Appendix 1 – Response Proforma

1. Background

The new King Henry VIII 3 – 19 School opened 1st September 2023, initially this will be on two sites, the former King Henry V111 site and the former Deri View Primary School site, the build is under construction and once the school moves to single site the funding formula will need to be agreed to reflect the first 3 – 19 school in Monmouthshire.

Following a meeting of the School Budget Funding Forum on the 23rd March 2023 members agreed to consult on creating a new funding formula to delegate funding for the new King Henry VIII 3 – 19 School.

The number of pupils determine the group of school and larger schools do receive additional funding for management structures and caretaking.

This proposal is not to increase the funding for the individual schools budget overall, however given the anticipated increase in rates it is proposed that cabinet will be asked to fund the increase in rates via a budget pressure.

2. Issues with current arrangements

- 2.1 Given that this is the first 3 – 19 school in Monmouthshire there is no formula to support the funding arrangements which mean that a new formula will need to be agreed.

3. Proposals.

3.1 Age weighted pupil unit.

All pupils are funded via a lump sum dependent on their age, lump sum is the same for all English medium schools with Welsh Medium receiving a small additional uplift. Each school only receive the funding for the ages that they teach.

This lump sum is calculated using several factors with the main funding relating to teaching staff. Other factors include: midday supervisors, resources, free school meals and funding for teaching assistants.

The regulations state that a minimum of 70% of the funding needs to be distributed in this way.

Proposal: No changes to this funding however the new school will receive the lump sum for all ages.

3.2 Premises and other factors.

The majority of the funding for premises costs are based on the floor or ground area with a condition weighting dependent on the age of the school. Rates are funded at actual cost.

The funding for caretaker is based on the group of school, group 1 schools which are the smallest schools receive funding for a part time caretaker while the larger schools receive additional funding for a full-time caretaker and an assistant caretaker.

Included in other factors are a number of service level agreements where funding is either a contribution to the cost or the full costs to buy back the service.

In addition to this funding is also provided for management structures and deprivation. The current formula for primary schools is a Headteacher and a teaching Deputy Headteacher, for secondary schools the funding reflects a Headteacher, a non-teaching Deputy Headteacher and 3 teaching assistant Headteachers.

Proposal:

There are no changes proposed to the funding for premises and ground, the areas will be adjusted to reflect the new school and the condition weighting will be reduced to one. Under the current formula building maintenance costs are reduced to reflect the warranties that will be in place.

The funding is reduced according to the age of the new build:-

Years 1 – 5 = 100% reduction in funding (although funding is provided for cyclical maintenance)

Years 6 – 10 = 50% reduction in funding (ensuring it covers the cyclical maintenance costs)

Years 11+ = 0% reduction in funding

Rates will continue to be funded at actual costs.

The service level agreement funding will be adjusted to reflect a group 7 school.

Deprivation will remain unchanged.

The funding for the management structure will reflect: Headteacher, 2 non-teaching Deputy Headteachers and 7 teaching Assistant Headteachers.

3.3 Additional Learning Needs.

The school will host two special resource bases, one for the primary phase and one for the secondary phase. The current funding for this is based on the numbers of staff needed to support the bases.

All school receive a delegated lump sum for which 70% is based on pupil numbers and 30% on the number of pupils supported by an individual development plan.

Proposals:

There are no proposals to change this funding.

The total funding for individual schools will not be affected and there is no reduction to the individual school budget.

Any changes to the formula will not be implemented until April 2025 for the financial year 2025-26.

The impact assessment is shown in Appendix 2.

4. Responses – to be received by noon on the 24th October 2023.

Please use appendix 1 below to complete your response.

APPENDIX 1 – RESPONSE PROFORMA

School represented (if applicable)

Formula area	I agree	I disagree	If you disagree, what is your proposal?
Age Weighted Pupil Unit (ref 3.1)			
Premises and other factors (ref 3.2)			
Additional Learning Needs (ref 3.3)			