

Gwynedd comparative expenditure on Schools 2015/16

Summary of the main points

General (part 2 of the paper)

- In total, and considering total school expenditure, either delegated or not, Gwynedd gross funding level is the 4th highest in Wales, and 3rd highest in net terms (the difference between gross and net figures is that gross includes expenditure funded from specific grants, and net does not). This is similar to the situation last year.

Primary (part 4)

- Funding per primary pupil in Gwynedd is the 2nd highest in Wales based on a gross basis and the highest in Wales on a net basis. Last year, we were 3rd and 4th highest in the indicators respectively.
- Gwynedd pupil: teacher ratio in this sector is the 3rd 'best' (i.e. lowest) amongst the 22 Welsh authorities. This compares to 6th lowest last year.
- Within Gwynedd, the situation in individual schools can vary significantly from the county average of £4,700 per pupil (delegated funding). Around 1% of our pupils attend schools which receive £8,900 per pupil on average (the smallest schools) whilst around 31% of the pupils attend schools who spend around £4,200 per pupil (schools with over 200 pupils).

Secondary (part 5)

- On a gross basis, funding per secondary school pupil in Gwynedd is the 6th highest throughout Wales. On a net-basis (which is a fairer comparison in any case, due to the effect of a different post-16 pattern on the gross figures), Gwynedd's position remains the 6th highest. We are therefore lower than in 2014/15, when we were the 4th highest based on gross and net.
- Despite this, Gwynedd the average class size is the 'best' (smallest) throughout Wales.

Special (part 6)

- Funding per pupil in Gwynedd (schools budget) is the 10th highest throughout Wales on a gross basis, and the 9th highest on net basis. This compares with the 8th highest on both comparators last year.
- This provides quite a different profile to Welsh Government statistics, which only take into account the delegated budget (where we are the 17th highest).
- The significant differences in the nature/scale of the provision and in the way council's record expenditure makes it more difficult to reach firm conclusions about comparative expenditure in this sector.
- Pupil: teacher ratio in Gwynedd is in the mid-table position; the 11th throughout Wales.

Conclusions

- It is likely that two factors lead to variations in expenditure per pupil throughout Wales - namely population density (that schools provision in a more dispersed area will cost more) and deprivation (that there is a need to spend more on pupils from deprived backgrounds to achieve the same outcome).
- With regards to population density, Gwynedd is the area with the third lowest population density in Wales. With regards to deprivation¹, based on the recognised indicators, Gwynedd is in 18th position.
- We would therefore expect that Gwynedd's expenditure per pupil would be somewhere between 3rd and 18th position in Wales.
- Based on this, it seems that our level of expenditure in the primary sector exceeds the expected range, and our position has improved since last year.
- With regards to the secondary sector, our comparative position has fallen since last year but it remains at the upper end of the expected range.
- Our special schools comparative position appears to be quite central in Wales (It is less apparent how much comparative impact population scarcity and deprivation has on the need to spend in this sector

Data sources for this paper

Budgets: RA and 'section 52' forms 2015/16

Pupil numbers: 'section 52' form 2015/16

Pupil numbers without Y 12 + 13: Schools Census (PLASC) January 2015

Pupils/teachers Ratio: Schools Census (PLASC) January 2015

¹ % pupils who receive free school meals

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1 Background and terminology

1.1 This paper mentions three budget categories, that are defined statutorily, namely:

- **Delegated budget** – budget delegated to individual schools;
- **Schools Budget** – that includes the delegated budget as well as other centrally kept specific budgets but directly involving supporting schools (e.g. elements of Special Learning Needs, school meals, musical instrument lessons etc.). How much, and which elements, of this will be delegated will vary according to individual councils policy;
- **Education Budget of relevance to Schools** – which includes the Schools Budget but also the LEA’s other functions associated (less directly) with schools. For instance, transport, school improvement, access and planning places, schools service strategic management.

1.2 This paper does **not** look at a fourth category namely the **Education Budget** that also contains elements beyond schools, e.g. administering student grants, transport to colleges, and the youth service.

1.3 **Gross** and **net** budgets are also mentioned. The only difference between the two is that gross figures include expenditure funded from specific grants, whilst net figures do not include grant funded expenditure. There is no one “correct” answer regarding whether to compare gross or net; gross figures provide a more complete profile of the resource for every pupil whilst net figures focus on the LEA’s contribution towards that total.

2 General

2.1 The Welsh Government publish an annual statistical bulletin on Schools comparative expenditure. This tends to focus on the gross rather than the net position, and compares a selection of the various budget categories mentioned above (although it is not always clear exactly which category, or if that category is the most meaningful for comparison).

2.2 The latest bulletin (June 2015²) includes a comparison of the **relevant Education Budget for Schools – gross** per pupil, across all sectors. This indicates that gross expenditure level per pupil in Gwynedd is the 4th highest throughout Wales and is almost 8% above the Welsh average. The detailed figures for Gwynedd, Wales and other rural councils are shown below.

Table 1
Relevant Education Budget for Schools – gross

	£ per pupil	Position (throughout Wales)
Ceredigion	6,322	1
Isle of Anglesey	6,058	3
Gwynedd	5,963	4
Conwy	5,942	5
Powys	5,887	6
Pembrokeshire	5,710	8
Monmouthshire	5,675	9
Carmarthenshire	5,630	10
Denbighshire	5,628	11
Welsh Average	5,526	

² <http://gov.wales/docs/statistics/2015/150630-local-authority-budgeted-expenditure-schools-2015-16-en.pdf>

- 2.3 There would be a slight change in Gwynedd’s position (from 4th to 3rd) if the same information was published on a net basis - see below. However, comparing on a net basis is slightly problematic due to the impact of the 6th form grant – more about this in section 5 below.

Table 2
Relevant Education Budget for schools – net

	£ per pupil	Position (throughout Wales)
Ceredigion	5,438	2
Gwynedd	5,279	3
Conwy	5,144	5
Isle of Anglesey	5,136	6
Powys	5,107	7
Monmouthshire	4,949	8
Carmarthenshire	4,945	9
Denbighshire	4,887	11
Pembrokeshire	4,877	12
Welsh Average	4,798	

- 2.4 Therefore in total, expenditure per pupil in Gwynedd is amongst the highest in Wales. It must however be borne in mind that this budget category includes transport costs and it is therefore not wholly unexpected that the most rural areas in Wales, Gwynedd being amongst them, would be around the top of the table.
- 2.5 The Government’s document goes on to compare the **gross delegated budget** per pupil, in total and in the three individual sectors. The figures are shown below for your information. It should be remembered that the delegation policies of different authorities impact these amounts and consequently the comparison is not very meaningful.

Table 3
Delegated budget per pupil³ - gross

	Primary	Position	Secondary	Position	Special	Position	Total	Position
Gwynedd	£4,672	3	£5,088	5	£18,490	17	£4,965	4
Wales	£4,174		£4,867		£20,222		£4,629	

3 General note: analysis per sector

- 3.1 The rest of the report scrutinises the situation in greater detail per sector (primary, secondary and special). A problem that has emerged with the comparisons is that several “middle” schools (i.e. 3-18 etc.) are being established across Wales. These are regarded as a separate sector (“middle schools”) in the budgetary data and pupil numbers.
- 3.2 It is not thus far a big problem (around 1% of the pupils in Wales attend these schools, within 6 Welsh authorities (3 in the “family”) having established ones). However, it may impact statistics for individual councils, especially when making comparisons between one year and another.

³ Number of places, rather than pupil numbers, are used for the special sector.

- 3.3 There is not much that we can do about this currently, but when comparing, we will need to be aware that changes between what is regarded as “primary sector” and “secondary sector” is changing from one county to another.

4 Primary Sector

- 4.1 As mentioned above, the Government’s published tables only look at delegated budgets. In addition, some authorities have specific schools for nursery age which are dealt with as a separate sector.
- 4.2 By combining the **Schools Budget** expenditure for primary and nursery sectors a more complete profile of the situation may be obtained. The table below shows these figures on a gross and net basis.

Table 4
Schools Budget – primary sector (and nursery)

	Gross		Net	
	£ per pupil	Position (throughout Wales)	£ per pupil	Position (throughout Wales)
Gwynedd	5,072	2	4,448	1
Conwy	5,009	3	4,386	3
Isle of Anglesey	4,969	4	4,271	4
Ceredigion	4,911	5	4,221	5
Pembrokeshire	4,767	6	4,102	6
Monmouthshire	4,685	7	4,080	7
Powys	4,597	9	3,978	9
Carmarthenshire	4,489	12	3,956	10
Denbighshire	4,468	14	3,863	15
Welsh Average	4,470		3,880	

- 4.3 Therefore, expenditure per pupil in Gwynedd is the 2nd highest in Wales on the gross basis and is the highest on the net basis. Our position has improved since 2014/15 when we were 3rd and 4th highest on both indicators respectively.

Pupils: teacher ratio (PTR)

- 4.4 Regarding every authority’s PTR ⁴ (**Appendix 1**) we can see that Gwynedd has the 3rd lowest ratio throughout Wales - 19.6, in comparison with the Welsh average of 21.2. (Note that it is the average profile across each authority here and not necessarily the situation at every school or section of a school).
- 4.5 Gwynedd’s PTR position (3rd lowest) remains slightly ‘worse’ than our expenditure level would suggest (2nd highest / highest), but has changed since last year when we were the 6th lowest. It could be expected that the link between PTR and expenditure level was to do with the extent to which councils have re-organised their schools (i.e. more of the total spent on staffing rather than building maintenance if there are fewer empty places) but it is difficult to test individual examples either way due to different delegation policies etc. and the impact of how expenditure is reported.

⁴ Note that the most recent PTR data reflect the situation in January 2015 i.e. 2014/15 financial year, therefore there is some difference in timing between them and the financial data.

School sizes and differences within Gwynedd

- 4.6 Another relevant consideration is how the county average can conceal substantial differences between schools. Although the average per pupil for the Gwynedd is £4,672, (delegated budget) , by grouping schools according to size we can see a variation (on average) of £8,928 per pupil in schools with fewer than 20 pupils, to £4,172 in schools with above 200 pupils.
- 4.7 This implies that only a small minority of pupils receive the highest funding levels whilst the majority of pupils are in schools which receive below the county average; this is shown in **Appendix 2**.

5 Secondary Sector

- 5.1 Once again, a more complete profile can be obtained by looking at **Schools Budget**; the gross figures are shown below.

Table 5
Schools Budget – secondary sector

	Gross	
	£ per pupil	Position (throughout Wales)
Ceredigion	5,650	2
Conwy	5,383	4
Gwynedd	5,374	6
Denbighshire	5,353	8
Carmarthenshire	5,283	10
Isle of Anglesey	5,272	11
Pembrokeshire	5,240	14
Powys	5,163	15
Monmouthshire	4,957	18
Welsh Average	5,205	

- 5.2 As the table above is on a gross basis, both expenditure and pupil numbers include post-16 data, but as the extent of provision of post-16 education varies between authorities (specifically the tertiary situation of Dwyfor / Meirionnydd in Gwynedd) it cannot be said that these figures truly compare like with like.
- 5.3 To overcome this, the net figures are shown below, that do not include expenditure funded by 6th form grant, compared with pupil numbers not including years 12 and 13⁵.

Table 6
Schools Budget – secondary sector – excluding year 12 and 13 from pupil numbers

	Net	
	£ per pupil	Position (throughout Wales)
Ceredigion	5,901	2
Conwy	5,514	3
Denbighshire	5,341	5
Gwynedd	5,308	6
Carmarthenshire	5,230	10
Isle of Anglesey	5,181	12
Pembrokeshire	5,110	13
Powys	5,082	14
Monmouthshire	5,060	16
Welsh Average	5,147	

⁵ Actual numbers for January 2015 is the only available data that enables non-inclusion of post-16 pupils; unfortunately, this implies some difference in timing between the financial data and pupil numbers but this is the best that can be done to compare like with like.

- 5.4 Therefore, the best available comparator shows that Gwynedd's secondary school funding level is the 6th highest in Wales; this compares to being the 4th highest in 2014/15.

Pupils: Teacher Ratio (PTR)

- 5.5 Each authority's PTR is shown in **Appendix 3**. We can see that class sizes in Gwynedd are considerably lower than the majority of other authorities and that we are in the lowest position throughout Wales.
- 5.6 It should be considered that the PTR census includes year 12 and 13 pupil numbers (and the corresponding proportion of the teachers); the figures cannot be adjusted to only look at year 7-11. Consequently, it could be argued that the actual position of Gwynedd PTR is even 'better' (i.e. lower) than suggested by the official data as y12 and 13 classes tend to be smaller in any case, and we have less y12 and 13 provision than other counties).
- 5.7 This aspect – that Gwynedd secondary PTR is lower than the expenditure position would suggest – has been noted in the past. It appears that Gwynedd spends less than comparative authorities on central headings such as ALN central budgets and school access, and it is that that rather than lower expenditure on teachers that explains how the budget per pupil is lower. However, the data's limitations and the impact on various delegation policies make it difficult to reach a definite conclusion on this.

6 Special Sector

- 6.1 It is extremely difficult to compare this sector due to differences in nature/scale of provision (e.g. some authorities have very specialist schools or residential provision). The situation in Ceredigion is also worth mentioning as there are no special schools there and consequently, these pupils would either be educated outside the county or attend mainstream schools (that may partially explain Ceredigion's high expenditure level particularly in the secondary sector).
- 6.2 Another problem is that the **Schools Budget** figure includes education costs at specialist independent schools. These can be substantial costs but these pupils are not part of the LEA's pupil number statistics.
- 6.3 Due to these problems, the **delegated budget figures** and the **schools budget** for this sector are shown below, noting that there are problems with both comparisons.
- 6.4 True pupil numbers are used (January 2015) for the comparisons below, rather than the number of places used in the Government's statistics. For the Schools Budget, payments and income from other authorities for pupils outside the county should also be deducted as these are not included in the pupil numbers used in the comparisons.
- 6.5 Regarding **delegated funding**, the gross and net figures are as follows:

Table 7
Delegated Budget – special sector

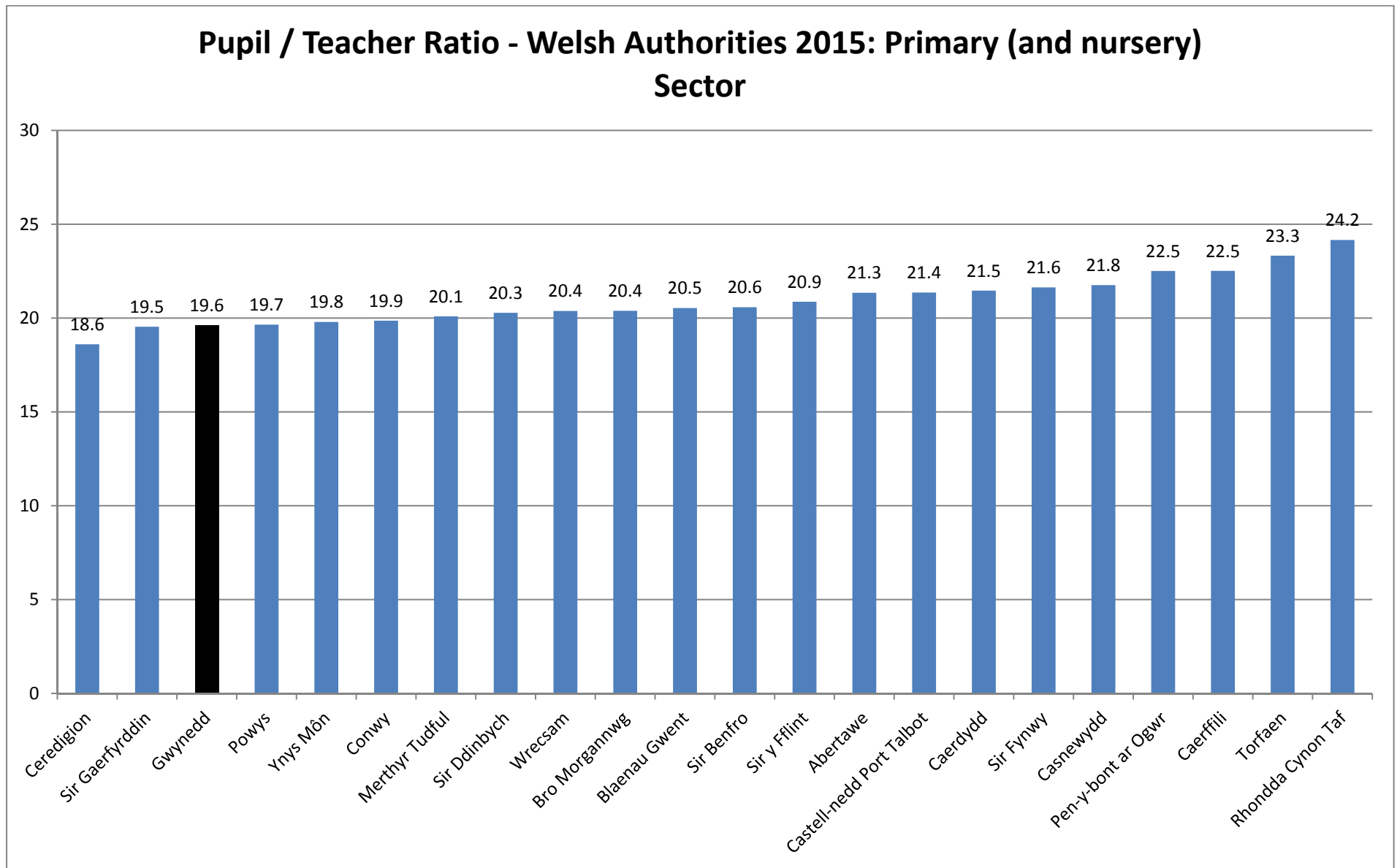
	Gross		Net	
	£ per pupil	Position (throughout Wales)	£ per pupil	Position (throughout Wales)
Monmouthshire	58,361	1	56,511	1
Carmarthenshire	28,177	2	27,761	2
Denbighshire	20,691	11	19,914	12
Powys	20,287	12	19,980	11
Pembrokeshire	20,223	13	19,007	13
Isle of Anglesey	18,906	15	18,591	15
Conwy	18,198	16	17,812	16
Gwynedd	17,009	18	16,713	18
Ceredigion	There are no special schools in Ceredigion			
	20,336		19,779	

6.6 **School Budget** figures are as follows:

Table 8
Schools Budget not including outside county transfers – special sector

	Gross		Net	
	£ per pupil	Position (throughout Wales)	£ per pupil	Position (throughout Wales)
Monmouthshire	62,908	1	61,058	1
Carmarthenshire	33,641	3	33,225	3
Isle of Anglesey	33,472	4	33,145	4
Denbighshire	24,143	9	23,116	11
Gwynedd	24,067	10	23,770	9
Powys	22,209	15	21,902	15
Pembrokeshire	20,926	18	19,676	19
Conwy	20,552	19	20,116	18
Ceredigion	No special schools in Ceredigion			
	24,394		23,810	

- 6.7 Therefore, overall the **delegated funding** figures echo the Government's figures that Gwynedd's funding level is below the average.
- 6.8 On the other hand, the **schools budget figures** (that provides a more accurate reflection of the total resource given to the field, despite the above-mentioned problem with pupils outside the county) suggest that Gwynedd's funding level is 9th or 10th highest in Wales. Last year, we were the 8th highest (on both gross and net basis).
- 6.9 The **pupil: teacher ratio** of Gwynedd's special schools is fairly central with regards to the rest of Wales; the 11th lowest (see **Appendix 4**). It is likely that differences in nature of provision county by county have a substantial impact on these figures.



Banding primary schools to different sizes: showing pupil numbers and funding per pupil in each band

