

School Resource Management

in partnership with



Department
for Education

**Integrated Curriculum and Financial Planning (ICFP)
Step by Step Guidance - Secondary Schools**

What is ICFP?

in partnership with



Department
for Education

The integrated curriculum and financial planning (ICFP) is a management process that helps schools plan the best curriculum for their pupils with the funding they have available.

It involves measuring your current curriculum, staffing structure and finances, and using data to create a 3 to 5 year plan.



Secondary Workbook Template – Step-by-step Guide

Introduction

There is no workbook of generic *ICFP spreadsheets that will meet the requirement of every school. There is however a set of basic principles that can be applied to suit any school or school group implementing an ICFP approach. The basic principles are outlined in the paper ‘Basic Principles of ICFP’.

*Integrated Curriculum and Financial Planning



Secondary Workbook Template – Step-by-step Guide

This guidance is written in the form of a manual for a workbook of spreadsheet templates designed to illustrate the key ideas.

A copy of the workbook can be found here

<https://www.gov.uk/guidance/integrated-curriculum-and-financial-planning-icfp#icfp-tools>

The bulk of these notes are dedicated to the four linked sheets that are an example of a full ICFP model. All the spreadsheets in the workbook are intended as worked examples that can be adapted for individual school or MAT use. It is not expected that any school will either want or need to use every aspect or approach contained in the workbook.

in partnership with



Tools for primary schools

Primary schools can use the [primary school workbook](#) (MS Excel Spreadsheet, 88KB) and [technical guide](#) (PDF, 349KB, 13 pages).

The Pioneer Academy Trust (primary) have developed their own set of tools and guidance including:

- a [staff deployment analysis tool](#) (MS Excel Spreadsheet, 76.4KB)
- a [staff deployment analysis tool with options to merge classes](#) (MS Excel Spreadsheet, 85KB)
- an accompanying [staff deployment analysis manual](#) (PDF, 1.34MB, 15 pages)

Watch The Pioneer Academy Trust's approach to ICFP in primary schools:



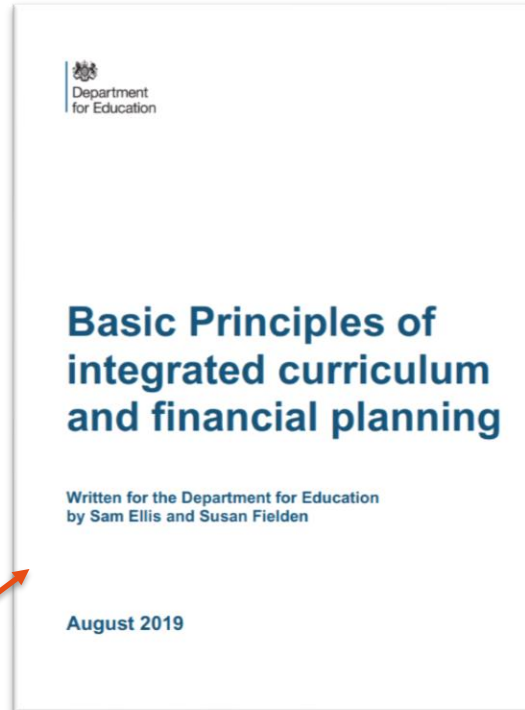
Tools for secondary schools

Secondary schools can use the [secondary school workbook](#) (MS Excel Spreadsheet, 100KB) and [technical guide](#) (PDF, 492KB, 18 pages).

Watch Outwood Grange Academy Trust's approach to ICFP and curriculum bonus:

Secondary Workbook Template – Step-by-step Guide

This guidance supports schools and trusts to generate the metrics necessary for an ICFP approach. Once the metrics have been calculated, the school's leaders, business manager and governors should go through the process of reconciliation as described in the 'Basic Principles of ICFP' paper found on this link



This is to make sure that the metrics are used to plan for a structure which is designed to deliver the best possible curriculum in the context of the available human, material and financial resources.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/828604/ICFP_guidance_-_basic_principles_logo.pdf



Any user is free to unlock and modify any of the sheets to suit their own purposes.

8																
9	Cycle length in periods	25		Contact	Non-Contact			Reference values			CALCULATIONS					
10	Staff by roll (Part time staff listed in categories lower down)	Headcount	FTE	Teaching Load	PPA	MGT	Other	Employed cycle periods per FTE	Check total	PPA %	Timetable contribution	PPA Total	MGT Total	Other Total	Employed Cycle Periods	
11	FULL TIME TEACHERS															
12	Headteacher	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
13	Deputy Headteacher	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
14	Assistant headteacher	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
15	Head of large curriculum area	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
16	Head of small curriculum area	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
17	Head of pastoral area	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
18	Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
19	Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
20	Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
21	Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
22	Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
23	Newly Qualified teachers	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
24	Full time classroom teachers	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
25	PART TIME TEACHERS															
26	Classroom teachers FTE 0.9	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
27	Classroom teachers FTE 0.8	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
28	Classroom teachers FTE 0.7	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
29	Classroom teachers FTE 0.6	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
30	Classroom teachers FTE 0.5	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
31	Classroom teachers FTE 0.4	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
32	Classroom teachers FTE 0.3	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
33	Classroom teachers FTE 0.2	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
34	Classroom teachers FTE 0.1	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0	0
35	Totals	0	0								0	0	0	0	0	0
36	Average teaching load	0.0														
37	Contact Ratio	0.00														
38	...															
	DEPLOYMENT PROJECTION YEAR	LINKED SHEET NOTES		WHAT IS CONTACT RATIO			MODELLING CONTACT			WHAT IS AVERAGE CLASS SIZE		BONUS AND BASIC		AT COST REFERENCE ...		

These sheets are the worked example to illustrate both strands of the ICFP process shown in the Overview of Key Elements section in the paper “Basic Principles of ICFP”. The detail of these sheets is covered in the later section of this paper called ‘The Linked Sheets’

All these sheets have notes on the sheets themselves.

[illegible]

	A	B	C	D	E	F	G	H	I	J	
1	This sheet sets out the ICFP process as a series of stepwise calculations starting from the finance perspective and ending with the curriculum perspective. It is possible to write this sheet in the reverse order starting from the curriculum perspective.										
2											
3	To inform the reconciliation process between finance and curriculum views there are four sections at the end of the curriculum section showing the curriculum impact of different FTE values. One of these is a Curriculum user input value. The key question is whether or not the curriculum timetable b										
4	the school. The approximate financial implications of each of the four options are shown.										
5											
6	Details of every calculation are outlined in column C and there are specific notes attached to some lines indicated with a red flag in the top right corner of the cell. Where figures are described as <u>shown</u> to a number of decimal places these have not been rounded and subsequent calculations using										
7	figures are <u>rounded</u> up or down to give an estimate that errs on the side of caution. For example this is done where the idea of a fraction of a teacher period is not a useful answer.										
8											
9	This sheet is illustrative of a calculation process. If it were used for actual ICFP analysis it would have the key weakness of not indicating any sense of a trend in the financial situation. It also omits any reference to metrics or KPI values. Because this sheet is set out as an explanation there are more l										
10											
11											
12											
13	Finance data and calculations from the current 'KNOWN' academic year at typical point in time (e.g. October 1st)										Comment
14	Total available revenue for the KNOWN academic year					£5,000,000	User input line				
15	Total expenditure on each teacher plus support in the KNOWN academic year					£3,880,000	User input line				

Lets look at each section below.

Secondary Workbook Template – Step-by-step Guide

Stepwise Overview Sheet

- As an introductory users could start by completing the Overview Sheet.
- This Sheet sets out the ICFP process as a series of stepwise calculations starting from the finance perspective and ending with the curriculum perspective. where the data and curriculum are being estimated.
- This sheet illustrates the main calculations but does not have any sense of financial trend, only covers one planned year and does not refer to Key Performance Indicators (KPIs) or metrics.
- Users are free to add further functionality to suit their own approach.

Finance data and calculations from the current 'KNOWN' academic year at typical point in time (e.g. October 1st)				Comment
Total available revenue for the KNOWN academic year	£5,000,000	User input line		
Total expenditure on teacher salary plus on cost in the KNOWN academic year	£2,880,000	User input line		
Total expenditure on everything except teacher costs in the KNOWN academic year	£2,100,000	User input line		
In year balance for the KNOWN academic year	£20,000	Calculation: Sum of lines 15 and 16 subtracted from line 14		
Carry forward or Deficit (enter as negative) brought into the KNOWN year from previous years	-£10,000	User input line (negative value inputs show in a red font)		
Cumulative balance at the end of the KNOWN year	£10,000	Calculation: Sum of lines 17 and 18		
FTE number of teachers in the KNOWN academic year	60.0	User input line		
Average Teacher cost in the KNOWN academic year	£48,000	Calculation: Line 15 divided by line 20		
Projected finance data and calculations for the PLANNED academic year				Comment
Estimated available revenue for the PLANNED academic year (Excluding carry forward or deficit)	£5,100,000	User input line		
Percentage change in revenue from KNOWN year (above) to PLANNED year	2.00%	Calculation: Change from line 14 to line 24 as a percentage of line 14		
Estimated minimum spend on everything except teacher costs for the PLANNED academic year (Could include a planned reserve)	£2,100,000	User input line		
Percentage change in minimum spend on everything except teacher costs from KNOWN year (above) to PLANNED year	0.00%	Calculation: Change from line 16 to line 26 as a percentage of line 16		
In year revenue available for teaching costs	£3,000,000	Calculation: Line 25 subtracted from line 24		
Average teacher cost copied from the KNOWN ACADEMIC YEAR above	£48,000	Value copied from line 21 above		
Estimated percentage change in average teacher cost from the KNOWN ACADEMIC YEAR to the PLANNED ACADEMIC YEAR (enter reduction as -ve)	2.0	User input line		
Estimated average teacher cost for the PLANNED ACADEMIC YEAR	£48,960	Calculation: line 20 modified by the percentage entered on line 30		
Estimated number of affordable teachers (FTE) in PLANNED ACADEMIC YEAR in a balanced in year budget (rounded down to 1 dp) (CALLED IN YEAR FTE)	61.2	Calculation: Line 28 divided by line 31 rounded down to one decimal place. Referred to below as "In year FTE"		
Carry forward or deficit (shown as negative) from known to PLANNED ACADEMIC YEAR copied from above	£10,000	Value copied from line 19 above		
Change in the number of FTE teachers implied by carry forward or deficit required for no carry forward from PLANNED ACADEMIC YEAR (SHOWN to 1dp)	0.2	Calculation: line 33 divided by line 31 and rounded to 1 decimal place to give an estimate of the FTE teacher equivalent of line 19		
Approximate FTE teachers required in the PLANNED ACADEMIC YEAR for approximate zero cumulative balance at the end of that year (CALLED CUMULATIVE FTE)	61.4	Calculation: Sum of line 32 and line 34. Referred to below as "Cumulative balance FTE"		
Proposed number of teachers to be employed in the PLANNED ACADEMIC YEAR (A user decision guided by the information above) (CALLED FINANCE FTE)	61.0	User input line		
Curriculum data for the KNOWN academic year at the same point in time (e.g. October 1st)				Comment
Total number of teacher periods on the timetable in the KNOWN ACADEMIC YEAR	1,140	User input line		
Length of timetable cycle in the KNOWN ACADEMIC YEAR	25	User input line		
FTE Teachers in the KNOWN ACADEMIC YEAR Copied from the finance section above	60.0	Value copied from line 20 above		
Average teaching load in the KNOWN ACADEMIC YEAR	19.00	Calculation: Line 39 divided by line 41 shown to 2 decimal places		
Teacher contact ratio in the KNOWN ACADEMIC YEAR	0.760	Calculation: line 42 divided by line 40 shown to 3 decimal places		
Total pupils on roll in September of the KNOWN ACADEMIC YEAR	1,000	User input line		
Average class size (pupil to teacher ratio in the classroom) in the KNOWN ACADEMIC YEAR	21.93	Calculation: line 44 multiplied by line 40 and the answer divided by line 39		
Pupil to teacher ratio (PTR) in the school in the KNOWN ACADEMIC YEAR	16.67	Calculation: line 44 divided by line 41 (n.b. Line 43 multiplied by line 45 gives the same answer see attached note)		
Curriculum data for the PLANNED academic year				Comment
Total estimated pupils on roll at September of the PLANNED ACADEMIC YEAR	1,000	User input line		
Target teacher contact ratio for the PLANNED ACADEMIC YEAR	0.780	User input line		
Timetable cycle for the PLANNED ACADEMIC YEAR	25	User input line		
Average teacher load for the PLANNED ACADEMIC YEAR	19.50	Calculation: Line 50 multiplied by line 51		
Curriculum impact for the PLANNED academic year based on different numbers of Teachers				
	With IN YEAR FTE	With CUMULATIVE FTE	With FINANCE FTE	User input FTE (Test Value)
FTE Teachers	61.2	61.4	61.0	60.0
PTR	16.34	16.29	16.39	16.67
Average class size for target teacher contact ratio	20.95	20.88	21.02	21.37
Teacher period budget (tp) at target teacher contact ratio	1193	1197	1189	1170
Relative bonus (ONLY APPLICABLE IF THE SCHOOL IS AN 11 to 16 SCHOOL) SEE NOTE LINKED TO CELL	28.9%	29.3%	28.5%	26.4%

Secondary Workbook Template – Step-by-step Guide

As Previously mentioned red sheets in this workbook are linked.



These linked sheets are in no sense a recommended approach; they illustrate one approach and are for information and possible adaptation only.



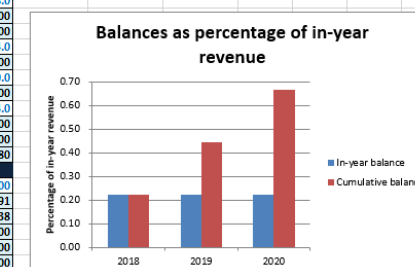
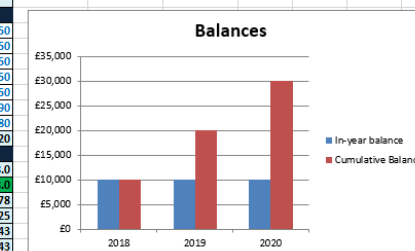
Secondary Workbook Template – Step-by-step Guide

The SUMMARY DATA sheet is designed to give an overview of the financial situation over a three to five year period with minimal technical detail.

The overview could be a helpful illustration for governors and wider school leadership, allowing to demonstrate different scenarios.

This high level financial approach linked to teacher deployment models will produce a reasonable estimate for the affordable number of FTE teachers for three to five years, which can then be reconciled with the curriculum plans together with a set of key performance indicators (KPIs) and metrics.

	BASE YEAR	Planned year	Projection year
Year in which the academic year starts	2018	2019	2020
PUPIL ROLL BY YEAR GROUP ESTIMATES			
Year 7	150	150	150
Year 8	150	150	150
Year 9	150	150	150
Year 10	150	150	150
Year 11	150	150	150
Year 12	90	90	90
Year 13	80	80	80
(Check for sense line) Totals	920	920	920
CURRICULUM DATA			
FTE Teachers employed (or planned to be employed in future years) COPIED FROM LINE 20 below	58.0	58.0	58.0
FTE Teachers Required in future years (Copied from the DEPLOYMENT SHEETS)	N/A	58.0	58.0
Contact ratio from DEPLOYMENT SHEETS (Shown to 2 decimal places)	0.78	0.78	0.78
Length of timetable cycle (Copied from the DEPLOYMENT SHEETS)	25	25	25
Average teaching load (Copied from the DEPLOYMENT SHEETS) Shown to 2 decimal places	19.41	19.43	19.43
Average class size i.e. pupil to teacher ratio in the curriculum (Copied from DEPLOYMENT SHEETS) shown to 2 decimal places	20.43	20.43	20.43
EXPENDITURE SUMMARY			
FTE Teachers employed (or planned to be employed in future years)	58.0	58.0	58.0
Total Teacher Cost Including on costs	£2,850,000	£2,850,000	£2,850,000
Total Educational Support Staff cost including on Costs	£350,000	£350,000	£350,000
FTE Educational Support Staff Employed	14.0	14.0	14.0
Total Admin and Clerical Staff cost including on costs	£250,000	£250,000	£250,000
FTE Admin and Clerical Staff Employed	10.0	10.0	10.0
Total of all other employed staff costs including on costs	£100,000	£100,000	£100,000
FTE total of all other staff employed	4.0	4.0	4.0
Total of all other revenue expenditure expenditure (i.e. all expenditure not included in the Total Teacher Cost)	£940,000	£940,000	£940,000
(Check for sense line) Total In Year Expenditure	£4,490,000	£4,490,000	£4,490,000
(Check for sense line) In year expenditure per pupil	£4,880	£4,880	£4,880
REVENUE SUMMARY			
Total in year revenue (exclude any carry forward or deficit)	£4,500,000	£4,500,000	£4,500,000
(Check for sense line) Per pupil revenue	£4,891	£4,891	£4,891
(Check for sense line) Average Teacher Cost	£49,138	£49,138	£49,138
(Check for sense line) Average Educational Support Staff Cost	£25,000	£25,000	£25,000
(Check for sense line) Average Admin Staff Cost	£25,000	£25,000	£25,000
(Check for sense line) Average All Other Employed staff cost	£25,000	£25,000	£25,000
In Year Balance	£10,000	£10,000	£10,000
Carry forward or deficit (enter as negative) from previous years	£0	N/A	N/A
Cumulative Balance	£10,000	£20,000	£30,000
PERCENTAGE CHANGES IN REVENUE AND COSTS FROM PREVIOUS YEAR			
Percentage change in Average Teacher Cost	N/A	0.0	0.0
Percentage change in Educational Support staff cost	N/A	0.0	0.0
Percentage change in Admin and Clerical staff cost	N/A	0.0	0.0
Percentage change in All Other Employed Staff cost	N/A	0.0	0.0
Percentage change in all other revenue expenditure	N/A	0.0	0.0
Percentage change in per pupil revenue	N/A	0.00%	0.00%
SUMMARY STATISTICS (Example potential KPI and benchmark values)			
Per Pupil Revenue (in Year)	£4,891	£4,891	£4,891



The data in the red tab sheets as supplied is sample data and does not represent any particular school at any point in time. The three years shown are initially identical in data terms.

The sheet can be populated with actual data in the BASE year and then with expected values and changes for the PLANNED and PROJECTION years to determine a possible ICFP strategy.

Secondary Workbook Template – Step-by-step Guide

Lines 14 to 18, 67 and 68 on SUMMARY DATA contain information linked from the DEPLOYMENT sheets. Pupil roll data and the number of FTE teachers to be employed are linked in the opposite direction from the SUMMARY DATA to the DEPLOYMENT sheets

13	FTE Teachers employed (or planned to be employed in future years) COPIED FROM LINE 20 below	58.0	58.0	58.0
14	FTE Teachers Required in future years (Copied from the DEPLOYMENT SHEETS)	N/A	58.0	58.0
15	Contact ratio from DEPLOYMENT SHEETS (Shown to 2 decimal places)	0.78	0.78	0.78
16	Length of timetable cycle (Copied from the DEPLOYMENT SHEETS)	25	25	25
17	Average teaching load (Copied from the DEPLOYMENT SHEETS) Shown to 2 decimal places	19.41	19.43	19.43
18	Average class size i.e. pupil to teacher ratio in the curriculum (Copied from DEPLOYMENT SHEETS) shown to 2 decimal places	20.43	20.43	20.43

67	Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	15.3%	15.3%	15.3%
68	Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	8.9%	8.9%	8.9%

Secondary Workbook Template – Step-by-step Guide

These sheets cover three years including the current year for which the data is known. The current year is referred to as the BASE YEAR.

The SUMMARY DATA sheet can be unlocked and extended to cover further years by duplicating columns. Additional DEPLOYMENT sheets can be created by copying the DEPLOYMENT PROJECTED YEAR sheet and updating the links to the new SUMMARY DATA sheet.

Although these notes describe the flow from Finance to Curriculum it is perfectly possible to work the approach from the opposite direction. In that case the critical output will be the in-year balance on the SUMMARY DATA sheet following from an initial policy based curriculum decision. How to deal with any resulting in-year surplus or deficit becomes the key leadership decision.

The pupil roll numbers for the base year and best estimates for future years are shown in this screenshot of the top of the SUMMARY DATA sheet.

	A	B	C	D
1		BASE YEAR	Planned year	Projection year
2	Year in which the academic year starts	2018	2019	2020
3	PUPIL ROLL BY YEAR GROUP ESTIMATES			
4	Year 7	150	151	152
5	Year 8	150	150	151
6	Year 9	150	150	150
7	Year 10	150	150	150
8	Year 11	150	149	147
9	Year 12	90	90	90
10	Year 13	80	80	80
11	(Check for sense line) Totals	920	920	920



Secondary Workbook Template – Step-by-step Guide

Please note: The values in the sheet as provided are illustrative and not intended to represent any actual school.

It should be noted that the estimate of future pupil roll numbers is a highly significant variable in ICFP work. A small error can have major consequences for financially related decisions.

Users should consider running three scenarios in parallel to represent most pessimistic, most likely and most optimistic pupil roll values.

Lines 19 to 47 give a summary of revenue funding and expenditure.

	A	B	C	D
19	EXPENDITURE SUMMARY			
20	FTE Teachers employed (or planned to be employed in future years)	58.0	58.0	58.0
21	Total Teacher Cost Including on costs	£2,850,000	£2,850,000	£2,850,000
22	Total Educational Support Staff cost including on Costs	£350,000	£350,000	£350,000
23	FTE Educational Support Staff Employed	14.0	14.0	14.0
24	Total Admin and Clerical Staff cost including on costs	£250,000	£250,000	£250,000
25	FTE Admin and Clerical Staff Employed	10.0	10.0	10.0
26	Total of all other employed staff costs including on costs	£100,000	£100,000	£100,000
27	FTE total of all other staff employed	4.0	4.0	4.0
28	Total of all other revenue expenditure expenditure (i.e. all expenditure not included in the Total Teacher Cost)	£940,000	£940,000	£940,000
29	(Check for sense line) Total In Year Expenditure	£4,490,000	£4,490,000	£4,490,000
30	(Check for sense line) In year expenditure per pupil	£4,880	£4,880	£4,880
31	REVENUE SUMMARY			
32	Total in year revenue (exclude any carry forward or deficit)	£4,500,000	£4,500,000	£4,500,000
33	(Check for sense line) Per pupil revenue	£4,891	£4,891	£4,891
34	(Check for sense line) Average Teacher Cost	£49,138	£49,138	£49,138
35	(Check for sense line) Average Educational Support Staff Cost	£25,000	£25,000	£25,000
36	(Check for sense line) Average Admin Staff Cost	£25,000	£25,000	£25,000
37	(Check for sense line) Average All Other Employed staff cost	£25,000	£25,000	£25,000
38	In Year Balance	£10,000	£10,000	£10,000
39	Carry forward or deficit (enter as negative) from previous years	£0	N/A	N/A
40	Cumulative Balance	£10,000	£20,000	£30,000
41	PERCENTAGE CHANGES IN REVENUE AND COSTS FROM PREVIOUS YEAR			
42	Percentage change in average teacher cost	N/A	0.0	0.0
43	Percentage change in Educational Support staff cost	N/A	0.0	0.0
44	Percentage change in Admin and clerical staff cost	N/A	0.0	0.0
45	Percentage change in All Other Employed Staff cost	N/A	0.0	0.0
46	Percentage change in all other revenue expenditure	N/A	0.0	0.0
47	Percentage change in per pupil revenue	N/A	0.00%	0.00%

Secondary Workbook Template – Step-by-step Guide

The facility to make estimated percentage changes in key values for the planned and projected years is included in lines 42 to 47. The base year of known data is in column B.

Lines 20, 23, 25 and 27 allow the user to test out FTE values of staff in different categories to see the impact on the financial bottom line. The bottom line is shown on lines 38 and 40 and as bar charts like this.

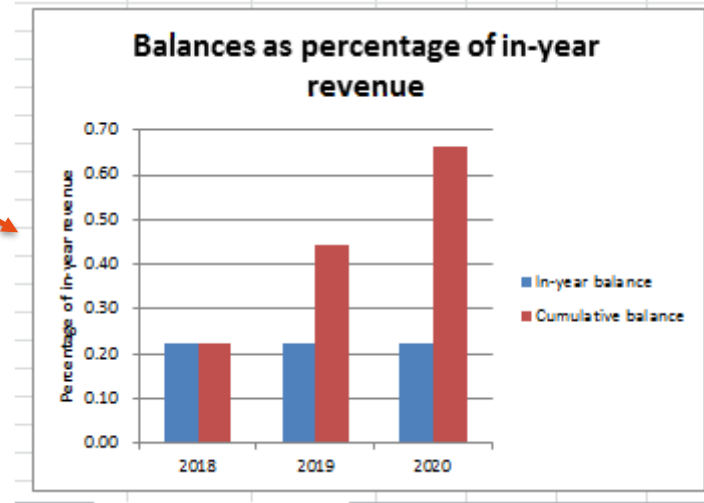
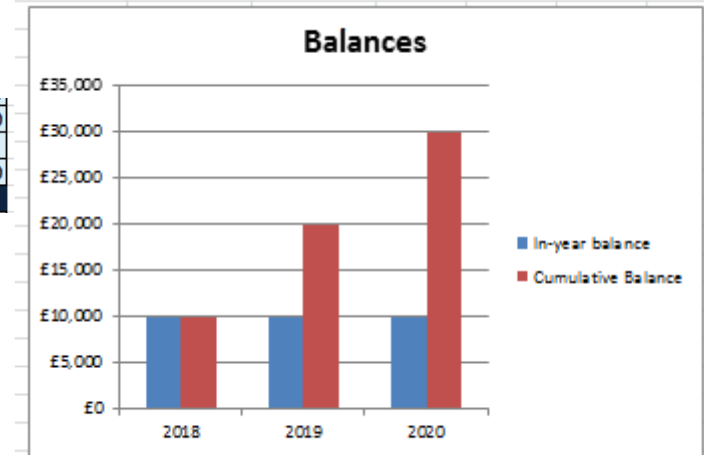
	A	B	C	D
19	EXPENDITURE SUMMARY			
20	FTE Teachers employed (or planned to be employed in future years)	58.0	58.0	58.0
21	Total Teacher Cost Including on costs	£2,850,000	£2,850,000	£2,850,000
22	Total Educational Support Staff cost including on Costs	£350,000	£350,000	£350,000
23	FTE Educational Support Staff Employed	14.0	14.0	14.0
24	Total Admin and Clerical Staff cost including on costs	£250,000	£250,000	£250,000
25	FTE Admin and Clerical Staff Employed	10.0	10.0	10.0
26	Total of all other employed staff costs including on costs	£100,000	£100,000	£100,000
27	FTE total of all other staff employed	4.0	4.0	4.0
28	Total of all other revenue expenditure expenditure (i.e. all expenditure not included in the Total Teacher Cost)	£940,000	£940,000	£940,000
29	(Check for sense line) Total In Year Expenditure	£4,490,000	£4,490,000	£4,490,000
30	(Check for sense line) In year expenditure per pupil	£4,880	£4,880	£4,880
31	REVENUE SUMMARY			
32	Total in year revenue (exclude any carry forward or deficit)	£4,500,000	£4,500,000	£4,500,000
33	(Check for sense line) Per pupil revenue	£4,891	£4,891	£4,891
34	(Check for sense line) Average Teacher Cost	£49,138	£49,138	£49,138
35	(Check for sense line) Average Educational Support Staff Cost	£25,000	£25,000	£25,000
36	(Check for sense line) Average Admin Staff Cost	£25,000	£25,000	£25,000
37	(Check for sense line) Average All Other Employed staff cost	£25,000	£25,000	£25,000
38	In Year Balance	£10,000	£10,000	£10,000
39	Carry forward or deficit (enter as negative) from previous years	£0	N/A	N/A
40	Cumulative Balance	£10,000	£20,000	£30,000
41	PERCENTAGE CHANGES IN REVENUE AND COSTS FROM PREVIOUS YEAR			
42	Percentage change in average teacher cost	N/A	0.0	0.0
43	Percentage change in Educational Support staff cost	N/A	0.0	0.0
44	Percentage change in Admin and leralical staff cost	N/A	0.0	0.0
45	Percentage change in All Other Employed Staff cost	N/A	0.0	0.0
46	Percentage change in all other revenue expenditure	N/A	0.0	0.0
47	Percentage change in per pupil revenue	N/A	0.00%	0.00%

Secondary Workbook Template – Step-by-step Guide

38	In Year Balance	£10,000	£10,000	£10,000
39	Carry forward or deficit (enter as negative) from previous years	£0	N/A	N/A
40	Cumulative Balance	£10,000	£20,000	£30,000
41	PERCENTAGE CHANGES IN REVENUE AND COSTS FROM PREVIOUS YEAR			



The bottom line is shown on lines 38 and 40 and as bar charts like this.



Secondary Workbook Template – Step-by-step Guide

	BASE YEAR	Planned year	Projection year
1			
2	2018	2019	2020
3	PUPIL ROLL BY YEAR GROUP ESTIMATES		
4	150	150	150
5	150	150	150
6	150	150	150
7	150	150	150
8	150	150	150
9	90	90	90
10	80	80	80
11	920	920	920
12	CURRICULUM DATA		
13	58.0	58.0	58.0
14	N/A	58.0	58.0
15	0.78	0.78	0.78
16	25	25	25
17	19.41	19.43	19.43
18	20.43	20.43	20.43
19	EXPENDITURE SUMMARY		
20	58.0	58.0	58.0
21	£2,850,000	£2,850,000	£2,850,000
22	£350,000	£350,000	£350,000
23	14.0	14.0	14.0
24	£250,000	£250,000	£250,000
25	10.0	10.0	10.0
26	£100,000	£100,000	£100,000
27	4.0	4.0	4.0
28	£940,000	£940,000	£940,000
29	£4,490,000	£4,490,000	£4,490,000
30	£4,880	£4,880	£4,880

In the planned and projected years the final staffing for any staff line will not be known in final detail so the total cost of each staff line needs to be estimated from what is known and what can be guessed. There are various ways of doing this and some users may just use their own software and approach and change all the total staff costs on lines 21, 22, 24 and 26 to user input values.

Secondary Workbook Template – Step-by-step Guide

The sheet uses an estimate of the average staff salary in the BASE year as a basis for calculation in the planned year.

Similarly the expected cost in the PLANNED year is used to make an estimate of the expected cost in the projected year. The user will need to consider any pay awards and changes in the pay profile of the staff on the line in question to arrive at a final estimate of any percentage change of the average staff cost on any particular line.

The expected FTE value multiplied by the average cost gives the estimated expenditure for that line.

	BASE YEAR	Planned year	Projection year
1			
2	2018	2019	2020
3	PUPIL ROLL BY YEAR GROUP ESTIMATES		
4	150	150	150
5	150	150	150
6	150	150	150
7	150	150	150
8	150	150	150
9	90	90	90
10	80	80	80
11	920	920	920
12	CURRICULUM DATA		
13	58.0	58.0	58.0
14	N/A	58.0	58.0
15	0.78	0.78	0.78
16	25	25	25
17	19.41	19.43	19.43
18	20.43	20.43	20.43
19	EXPENDITURE SUMMARY		

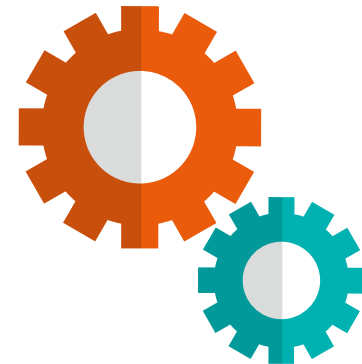
Base Year Column

Planned Year
Column

Secondary Workbook Template – Step-by-step Guide

FTE values for support staff with a mix of full term-time only and part-time working patterns can be complicated to calculate. Because this workbook is not linked to the financial systems used in the school this can be simplified by using FTE values that are internally consistent to the workbook itself.

For example, using the term time FTE value for Educational Support staff will work just as well as using a totally accurate value and possibly be simpler. Where such a notional value is used it is important to remember to convert this back to an actual value when moving back to the accurate financial system.



Secondary Workbook Template – Step-by-step Guide

The revenue funding available for any one year is summarised on line 32 as an overall total.

It is a user input for each year. It may be useful to extend that section to show elements of funding such as schools block, pupil premium, post 16, etc.

The percentage change in the overall per pupil amount is shown on line 47 as a check for sense.

The user will need to be able to estimate future funding levels from the school's current financial software unless this sheet is modified to include an estimate of percentage change in various funding streams.

	A	B	C	D
		BASE YEAR	Planned year	Projection year
		2018	2019	2020
1				
2	Year in which the academic year starts			
3	PUPIL ROLL BY YEAR GROUP ESTIMATES			
4	Year 7	150	150	150
5	Year 8	150	150	150
6	Year 9	150	150	150
7	Year 10	150	150	150
8	Year 11	150	150	150
9	Year 12	90	90	90
10	Year 13	80	80	80
11	(Check for sense line) Totals	920	920	920
12	CURRICULUM DATA			
13	FTE Teachers employed (or planned to be employed in future years) COPIED FROM LINE 20 below	58.0	58.0	58.0
14	FTE Teachers Required in future years (Copied from the DEPLOYMENT SHEETS)	N/A	58.0	58.0
15	Contact ratio from DEPLOYMENT SHEETS (Shown to 2 decimal places)	0.78	0.78	0.78
16	Length of timetable cycle (Copied from the DEPLOYMENT SHEETS)	25	25	25
17	Average teaching load (Copied from the DEPLOYMENT SHEETS) Shown to 2 decimal places	19.41	19.43	19.43
18	Average class size i.e. pupil to teacher ratio in the curriculum (Copied from DEPLOYMENT SHEETS) shown to 2 decimal places	20.43	20.43	20.43
19	EXPENDITURE SUMMARY			
20	FTE Teachers employed (or planned to be employed in future years)	58.0	58.0	58.0
21	Total Teacher Cost Including on costs	£2,850,000	£2,850,000	£2,850,000
22	Total Educational Support Staff cost including on Costs	£350,000	£350,000	£350,000
23	FTE Educational Support Staff Employed	14.0	14.0	14.0
24	Total Admin and Clerical Staff cost including on costs	£250,000	£250,000	£250,000
25	FTE Admin and Clerical Staff Employed	10.0	10.0	10.0
26	Total of all other employed staff costs including on costs	£100,000	£100,000	£100,000
27	FTE total of all other staff employed	4.0	4.0	4.0
28	Total of all other revenue expenditure expenditure (i.e. all expenditure not included in the Total Teacher Cost)	£940,000	£940,000	£940,000
29	(Check for sense line) Total In Year Expenditure	£4,490,000	£4,490,000	£4,490,000
30	(Check for sense line) In year expenditure per pupil	£4,880	£4,880	£4,880
31	REVENUE SUMMARY			
32	Total in year revenue (exclude any carry forward or deficit)	£4,500,000	£4,500,000	£4,500,000
33	(Check for sense line) Per pupil revenue	£4,891	£4,891	£4,891
34	(Check for sense line) Average Teacher Cost	£49,138	£49,138	£49,138
35	(Check for sense line) Average Educational Support Staff Cost	£25,000	£25,000	£25,000
36	(Check for sense line) Average Admin Staff Cost	£25,000	£25,000	£25,000
37	(Check for sense line) Average All Other Employed staff cost	£25,000	£25,000	£25,000
38	In Year Balance	£10,000	£10,000	£10,000
39	Carry forward or deficit (enter as negative) from previous years	£0	N/A	N/A
40	Cumulative Balance	£10,000	£20,000	£30,000
41	PERCENTAGE CHANGES IN REVENUE AND COSTS FROM PREVIOUS YEAR			
42	Percentage change in Average Teacher Cost	N/A	0.0	0.0
43	Percentage change in Educational Support staff cost	N/A	0.0	0.0
44	Percentage change in Admin and Clerical staff cost	N/A	0.0	0.0
45	Percentage change in All Other Employed Staff cost	N/A	0.0	0.0
46	Percentage change in all other revenue expenditure	N/A	0.0	0.0
47	Percentage change in per pupil revenue	N/A	0.00%	0.00%
48	SUMMARY STATISTICS (Example potential KPI and benchmark values)			
49	Per Pupil Revenue (in Year)	£4,891	£4,891	£4,891

AUTHOR NOTE

STEPWISE OVERVIEW

SUMMARY DATA

DEPLOYMENT BASE YEAR

DEPLOYMENT PLANNED YEAR

Secondary Workbook Template – Step-by-step Guide

The two sections on the SUMMARY DATA that link to the curriculum are the CURRICULUM DATA and SUMMARY STATISTICS sections.

The CURRICULUM DATA section is shown here.

	A	B	C	D
12	CURRICULUM DATA			
13	FTE Teachers employed (or planned to be employed in future years) COPIED FROM LINE 20 below	58.0	58.0	58.0
14	FTE Teachers Required in future years (Copied from the DEPLOYMENT SHEETS)	N/A	57.8	57.8
15	Contact ratio from DEPLOYMENT SHEETS (Shown to 2 decimal places)	0.78	0.78	0.78
16	Length of timetable cycle (Copied from the DEPLOYMENT SHEETS)	25	25	25
17	Average teaching load (Copied from the DEPLOYMENT SHEETS) Shown to 2 decimal places	19.41	19.50	19.50
18	Average class size i.e. pupil to teacher ratio in the curriculum (Copied from DEPLOYMENT SHEETS) shown to 2 decimal places	20.43	20.43	20.43
19	EXPENDITURE SUMMARY			

Line 13 has a copy of the number of FTE teachers employed in the BASE YEAR and the proposed number to be employed from the financial perspective in the PLANNED and PROJECTED years.

The values for FTE Teachers required shown on line 14 are the outputs from the planning sheets DEPLOYMENT PLANNED YEAR and DEPLOYMENT PROJECTED YEAR.

Secondary Workbook Template – Step-by-step Guide

The cells in C14 and D15 are conditionally formatted to draw attention to the relationship with the total of FTE teachers from the finance perspective. The red flag in the upper right corner of cell A14 indicates a comment on this which can be read by placing the cursor over that cell.

Reconciliation between the finance and curriculum FTE teacher values is achieved by adjusting values on the finance sheets or on the deployment sheets or on both.

	A	B	C	D
12	CURRICULUM DATA			
13	FTE Teachers employed (or planned to be employed in future years) COPIED FROM LINE 20 below	58.0	58.0	58.0
14	FTE Teachers Required in future years (Copied from the DEPLOYMENT SHEETS)	N/A	57.8	57.8
15	Contact ratio from DEPLOYMENT SHEETS (Shown to 2 decimal places)	0.78	0.78	0.78
16	Length of timetable cycle (Copied from the DEPLOYMENT SHEETS)	25	25	25
17	Average teaching load (Copied from the DEPLOYMENT SHEETS) Shown to 2 decimal places	19.41	19.50	19.50
18	Average class size i.e. pupil to teacher ratio in the curriculum (Copied from DEPLOYMENT SHEETS) shown to 2 decimal places	20.43	20.43	20.43

This workbook produces a wide range of statistics and KPIs that schools could measure – but schools and trusts should instead choose the metrics that are most pertinent to their circumstances. For example, displaying relative curriculum bonus and average class size gives some duplicated information, so it is suggested that schools and MATs restrict themselves to those statistics and displays that are valid, useful and necessary. This and other possible redundancies have been included to illustrate various statistics in common use across a range of schools rather than present a recommended set for any one school.

Secondary Workbook Template – Step-by-step Guide

The statistical section summarises a list of possible targets, benchmark values and KPIs and looks like this.

	A	B	C	D	E	F	G	H
48	SUMMARY STATISTICS (Example potential KPI and benchmark values)							
49	Per Pupil Revenue (in Year)	£4,891	£4,891	£4,891				
50	Average Teacher Cost	£49,138	£49,138	£49,138				
51	In year balance as a percentage of in year revenue	0.22	0.22	0.22				
52	Cumulative balance as a percentage of the in year revenue	0.22	0.44	0.67				
53	Pupil to teacher ratio (This is the number of pupils on roll divided by the number of teachers employed)	15.86207	15.86207	15.86207				
54	Teacher contact ratio	0.78	0.78	0.78	The product of these two quantities equals the Pupil to Teacher Ratio in the school			
55	Average Class Size for PTR and Contact ratio on previous two lines	20.43	20.34	20.34				
56	Average Class Size on DEPLOYMENT SHEETS (see comment attached to cell)	20.43	20.43	20.43				
57	Proportion of in year revenue spent on teaching staff	63%	63%	63%				
58	Proportion of in year revenue available for teaching in a balanced budget if all other costs are fixed	63.6%	63.6%	63.6%				
59	PTR value in a balanced budget based on in year revenue	15.8	15.8	15.8				
60	AFFORDABLE FTE TEACHERS in a balanced budget (Shown to 1 decimal place)	58.2	58.2	58.2				
61	FTE TEEACHERS EMPLOYED	58.0	58.0	58.0				
62	Teachers employed to Ed support staff ratio	4.1	4.1	4.1				
63	All staff to admin staff ratio	8.6	8.6	8.6				
64	Pupil to Ed support staff ratio	65.7	65.7	65.7				
65	Pupil to adult ratio	10.7	10.7	10.7				
66	Proportion of revenue spent on staff costs	78.9%	78.9%	78.9%				
67	Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	15.3%	15.3%	15.3%	Includes whole school teacher periods			
68	Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	8.9%	8.9%	8.9%	Excludes whole school teacher periods			

There is a significant difference between the DEPLOYMENT BASE YEAR sheet and the deployment sheets for the planned year and projected year even though the sheets themselves look very similar.

In the DEPLOYMENT BASE YEAR SHEET the average teaching load and hence the teacher contact ratio is the result or output of the sheet.

Secondary Workbook Template – Step-by-step Guide

In the DEPLOYMENT PLANNED YEAR and DEPLOYMENT PROJECTED YEAR sheets the output of the sheet is a total number of teacher periods required for the desired curriculum. The teacher contact ratio is now a user input for those sheets that converts the teacher period total to a number of FTE teachers that the school would need to employ to staff the curriculum in question.

This screenshot shows the
DEPLOYMENT BASE YEAR
sheet. 

	A	B	C	D	E	F
1	TEACHER DEPLOYMENT PLAN FOR THE BASE YEAR					
2	Year	2018	This section records the actual teacher period allocations and brief curriculum descriptions of the actual timetable in use in			
3	Timetable cycle length in periods	25	the base year.			
4	National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers employed	NOTES
5	Year 7	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
6	Year 8	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
7	Year 9	150	154	24.35	7.93	6 groups for 23 periods, 8 groups for 2 periods
8	Year 10	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3period blocks
9	Year 11	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3period blocks
10	Year 12	90	175	12.86	9.01	5 x 5 period option blocks, 7 subjects per block includes retakes and enrichment
11	Year 13	80	150	13.33	7.73	5 x 5 period option blocks, 6 subjects per block includes and enrichment
12	Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
13	Learning Support	n/a	25	n/a	1.29	25 teacher periods per week used for pupil extraction work in a learning support base
14	Intervention activity	n/a	10	n/a	0.52	10 teacher periods per week for one to one activity
15	Other teacher contact time	n/a	10	n/a	0.52	10 teacher periods allocated to inclusion unit
16	Overall totals					
17		Roll	tp Allocation	The average teaching load and hence the contact ratio are the key OUTPUTS for this section. The AVERAGE LOAD is simply the total number of tp allocated divided by the FTE number of teachers employed. The contact ratio is then given by dividing the average load by the number of periods in the cycle. Average Load and Contact ratio are shown to two places of decimals. The value for contact rsatio should be used to inform the view of the value to be used on sheets for future years.		
18	Totals	920	1126			
19	TEACHER IMPLICATIONS					
20	Average Class Size (PTR in the curriculum)		20.43			
21	Contact Ratio		0.78			
22	Average teaching load		19.41			

Secondary Workbook Template – Step-by-step Guide

The year (cell B2) is copied from the SUMMARY DATA sheet. The timetable cycle length (cell B3) is a user input on this sheet and is copied to the SUMMARY DATA sheet. The pupil roll numbers in column B are copied from the SUMMARY DATA sheet.

	A	B	C	D	E	F
1	TEACHER DEPLOYMENT PLAN FOR THE BASE YEAR					
2	Year	2018	This section records the actual teacher period allocations and brief curriculum descriptions of the actual timetable in use in the base year.			
3	Timetable cycle length in periods	25				
4	National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers employed	NOTES
5	Year 7	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
6	Year 8	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
7	Year 9	150	154	24.35	7.93	6 groups for 23 periods, 8 groups for 2 periods
8	Year 10	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3period blocks
9	Year 11	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3period blocks
10	Year 12	90	175	12.86	9.01	5 x 5 period option blocks, 7 subjects per block includes retakes and enrichment
11	Year 13	80	150	13.33	7.73	5 x 5 period option blocks, 6 subjects per block includes and enrichment
12	Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
13	Learning Support	n/a	25	n/a	1.29	25 teacher periods per week used for pupil extraction work in a learning support base
14	Intervention activity	n/a	10	n/a	0.52	10 teacher periods per week for one to one activity
15	Other teacher contact time	n/a	10	n/a	0.52	10 teacher periods allocated to inclusion unit
16	Overall totals					
17		Roll	tp Allocation	The average teaching load and hence the contact ratio are the key OUTPUTS for this section. The AVERAGE LOAD is simply the total number of tp allocated divided by the FTE number of teachers employed. The contact ratio is then given by dividing the average load by the number of periods in the cycle. Average Load and Contact ratio are shown to two places of decimals. The value for contact rsatio should be used to inform the view of the value to be used on sheets for future years.		
18	Totals	920	1126			
19	TEACHER IMPLICATIONS					
20	Average Class Size (PTR in the curriculum)		20.43			
21	Contact Ratio		0.78			
22	Average teaching load		19.41			

The deployment of all teacher contact time in teacher periods is shown in column C on lines 5 to 11 and lines 13 to 15. The teacher periods are those actually allocated to the different year groups and Whole School Areas that support the year groups in some manner. The figures are at a typical point in the school year, corresponding to the point taken in the SUMMARY DATA sheet for the number of FTE teachers employed in the BASE year.

Secondary Workbook Template – Step-by-step Guide

In the version of deployment analysis shown above, teacher periods used for small-group or individual intervention are classed as ‘Whole School Areas’ and recorded separately from the year groups. These periods could be distributed in a notional manner adding to the totals already shown for each year group. This would remove the need for lines 12 to 15 and allow the statistic Average Class Size to be used for all teacher period allocations.

Column F shows brief notes summarising the curriculum structure that produces the teacher period total on that line.



	A	B	C	D	E	F
1	TEACHER DEPLOYMENT PLAN FOR THE BASE YEAR					
2	Year	2018	This section records the actual teacher period allocations and brief curriculum descriptions of the actual timetable in use in			
3	Timetable cycle length in periods	25	the base year.			
4	National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers employed	NOTES
5	Year 7	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods, 8 groups for 2 periods
6	Year 8	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods, 8 groups for 2 periods
7	Year 9	150	154	24.35	7.93	6 groups for 23 periods, 8 groups for 2 periods
8	Year 10	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3 period blocks
9	Year 11	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3 period blocks
10	Year 12	90	175	12.86	9.01	5 x 5 period option blocks, 7 subjects per block includes retakes and enrichment
11	Year 13	80	150	13.33	7.73	5 x 5 period option blocks, 6 subjects per block includes and enrichment
12	Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
13	Learning Support	n/a	25	n/a	1.29	25 teacher periods per week used for pupil extraction work in a learning support base
14	Intervention activity	n/a	10	n/a	0.52	10 teacher periods per week for one to one activity
15	Other teacher contact time	n/a	10	n/a	0.52	10 teacher periods allocated to inclusion unit

Secondary Workbook Template – Step-by-step Guide

The Average Class Size statistic has been included for each year group to give a feel for the pupil to teacher ratio in that area. There is a single sheet in this workbook explaining this statistic in more detail and in particular showing the difference between the average class size and the average size of a teaching group. It should be noted that the average class size statistic is comparable between schools with different timetable cycles or between years in the same school where the number of periods in the timetable cycle is changed. As a check for sense the average class size in Key stage 3 usually varies between 24 and 29 depending upon how close the year group roll is to a multiple of 30. The average class size is usually smaller in key stage 4 as a result of extra nurture groups and option schemes and typically is in the low twenties. These are not recommended benchmark ranges; they are just indicators of possible errors in year group allocations.



Secondary Workbook Template – Step-by-step Guide

If teacher periods intended for small group extraction or intervention are shown separately as in a Whole School section rather than allocated notionally across the actual year groups there will be no pupil roll for those periods because the pupils they will be dealing with have already been counted somewhere in the year group totals. Furthermore the pupils in question may be a fluid cohort extracted from the various year groups on the basis of changing need. In this case the roll number for these periods is shown as 'n/a' (not applicable) and hence a calculation of average class size for those individual lines is mathematically equal to zero and is meaningless and hence shown as 'n/a'. Nevertheless the teacher periods allocated have the effect in the complete timetable of reducing the overall average class size and therefore must be included in the global total at the foot of the table. Showing Whole School Periods on separate lines has a value in that the number of FTE teachers being employed in the school to deliver those lines can be seen. The same line of argument applies in a school which uses the BASIC/BONUS/Relative bonus approach (see below); there is no 'Basic' reference level of teacher time for zero pupils. Hence showing relative bonus on an individual line that has a teacher period allocation but no pupil allocation is not possible as any attempt produces a divide by zero error.

Secondary Workbook Template – Step-by-step Guide

The overall average class size is a key variable in the fundamental equation which governs ICFP and must include all allocations for teacher time such as the Whole School Periods referred to in the previous paragraph. The overall average class size is in cell C20 and is one way of assessing the impact of teacher time in the curriculum which can be benchmarked between schools with different timetable cycles.

	A	B	C	D	E	F
1	TEACHER DEPLOYMENT PLAN FOR THE BASE YEAR					
2	Year	2018	This section records the actual teacher period allocations and brief curriculum descriptions of the actual timetable in use in			
3	Timetable cycle length in periods	25	the base year.			
4	National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers employed	NOTES
5	Year 7	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
6	Year 8	150	133	28.20	6.85	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
7	Year 9	150	154	24.35	7.93	6 groups for 23 periods, 8 groups for 2 periods
8	Year 10	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3period blocks
9	Year 11	150	168	22.32	8.65	7 groups for 16 periods, 8 option subjects per block in 3 x 3period blocks
10	Year 12	90	175	12.86	9.01	5 x 5 period option blocks, 7 subjects per block includes retakes and enrichment
11	Year 13	80	150	13.33	7.73	5 x 5 period option blocks, 6 subjects per block includes and enrichment
12	Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
13	Learning Support	n/a	25	n/a	1.29	25 teacher periods per week used for pupil extraction work in a learning support base
14	Intervention activity	n/a	10	n/a	0.52	10 teacher periods per week for one to one activity
15	Other teacher contact time	n/a	10	n/a	0.52	10 teacher periods allocated to inclusion unit
16	Overall totals					
17		Roll	tp Allocation	The average teaching load and hence the contact ratio are the key OUTPUTS for this section. The AVERAGE LOAD is simply the total number of tp allocated divided by the FTE number of teachers employed. The contact ratio is then given by dividing the average load by the number of periods in the cycle. Average Load and Contact ratio are shown to two places of decimals. The value for contact rsatio should be used to inform the view of the value to be used on sheets for future years.		
18	Totals	920	1126			
19	TEACHER IMPLICATIONS					
20	Average Class Size (PTR in the curriculum)		20.43			
21	Contact Ratio		0.78			
22	Average teaching load		19.41			

Secondary Workbook Template – Step-by-step Guide

Some schools prefer to use an approach which uses the terms BONUS and BASIC to benchmark teacher time in the curriculum. It is only applicable to years 7 to 11 in its original form. The approach is outlined in a standalone spreadsheet BASIC AND BONUS in the workbook. For the sake of completeness it is referenced at the foot of each of the deployment sheets in the following manner and shown in the KPI section of the SUMMARY DATA sheet. Using both the Average Class Size statistic and Relative Curriculum Bonus creates duplication as they express the same thing (the allocation of teacher time) but in different ways.

	A	B	C	D	E
26	The following data is shown for users who wish to reference their 11 to 16 curriculum to the BASIC/BONUS model of T.I.Davies with the BASIC reference line being the teacher periods required for an average class size of 27 in years 7 to 11. Note that these calculations both exclude any post 16 curriculum teacher periods				
27					
28					
29					
30	Calculation excluding whole school tp				
31	Total tp allocated in years 7 to11				756
32	BASIC reference level of Teacher Periods for Average Class Size =27				694.4
33	BONUS number of teacher periods				61.6
34	Relative Curriculum Bonus (BONUS as % of BASIC)				8.86%
35	Calculation including whole school tp				
36	Total tp allocated in years 7 to11				801
37	BASIC reference level of Teacher Periods for Average Class Size =27				694.4
38	BONUS number of teacher periods				106.6
39	Relative Curriculum Bonus (BONUS as % of BASIC)				15.34%

Secondary Workbook Template – Step-by-step Guide

The drawback with Relative Curriculum Bonus in its original form is that it only applies to years 7 to 11 in a secondary school. Some schools interpret the BONUS/BASIC ideas in their own way and find that useful. The use of BONUS in benchmarking is impossible where the same technical term means different things in different schools. Cell C21 on the DEPLOYMENT BASE YEAR sheet gives the teacher contact ratio as the result of the BASE year deployment analysis. This is the second of the five variables in the fundamental equation governing ICFP. For reference the Average Class Size and the contact ratio multiplied together gives the Pupil to Teacher Ratio in the school. The deployment sheets for the planned year and the projected year work in exactly the same way. The key point is that the teacher contact ratio for these two sheets is a user input in cell C21.

	A	B	C
1			
2	Year	2020	This section r
3	Timetable cycle length in periods	25	YEAR called t
4	National Curriculum Year	Pupil Roll	tp Allocation
5	Year 7	152	133
6	Year 8	151	133
7	Year 9	150	154
8	Year 10	150	168
9	Year 11	147	168
10	Year 12	90	175
11	Year 13	80	150
12	Whole Scho		
13	Learning Support	n/a	25
14	Intervention activity	n/a	10
15	Other teacher contact time	n/a	10
16			
17		Roll	tp Allocation
18	Totals	920	1126
19	TEACHER IMPLICATIONS		
20	Average Class Size (PTR in the curriculum)		20.43
21	Contact Ratio		0.78
22	Average teaching load		19.5
23	FTE TEACHERS REQUIRED BY THIS DEPLOYMENT		57.8
24	FTE TEACHERS EMPLOYED	58.00	This value c this cell
25			
26			

Secondary Workbook Template – Step-by-step Guide

The planned curriculum is outlined in words in column F and teacher period totals in column C. The teacher contact ratio value in C21 converts the teacher period total to an FTE number of teachers shown on line 23. The section shown in yellow is copied from the finance information on the SUMMARY DATA sheet. This section is conditionally formatted as described in the note in the box from columns C to F.

	A	B	C	D	E	F
1	TEACHER DEPLOYMENT PLAN FOR THE PLANNED YEAR					
2	Year	2020	This section records the intended teacher period allocations and brief curriculum descriptions for timetable planning in the year following the PLANNED			
3	Timetable cycle length in periods	25	YEAR called the PROJECTED YEAR.			
4	National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers required	NOTES
5	Year 7	152	133	28.57	6.82	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
6	Year 8	151	133	28.38	6.82	5 groups for 21 periods, 6 groups for 2 periods,8 groups for 2 periods
7	Year 9	150	154	24.35	7.90	6 groups for 23 periods, 8 groups for 2 periods
8	Year 10	150	168	22.32	8.62	7 groups for 16 periods, 8 option subjects per block in three 3 period blocks
9	Year 11	147	168	21.88	8.62	7 groups for 16 periods, 8 option subjects per block in three 3 period blocks
10	Year 12	90	175	12.86	8.97	5 x 5 period option blocks, 7 subjects per block including retakes and enrichment
11	Year 13	80	150	13.33	7.69	5 x 5 period option blocks, 6 subjects per block including enrichment
12	Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
13	Learning Support	n/a	25	n/a	1.28	25 teacher periods per week for support work with extracted pupils
14	Intervention activity	n/a	10	n/a	0.51	10 teacher periods per week for targeted 1:1 work and team teaching
15	Other teacher contact time	n/a	10	n/a	0.51	10 teacher periods initially unallocated for timetable flexibility but eventually for use in intervention
16	Overall totals					
17		Roll	tp Allocation	The contact ratio is the key input for this section. It determines the average teaching load and hence the number of FTE teachers required to deliver the number of teacher periods outlined in the deployment above. The value for the FTE required must either equal or be lower than value for the FTE teachers to be employed if the deployment is going to fit within the financial plan on the summary sheet. The FTE value required by the deployment can be reduced by increasing the contact ratio or increasing the average class size which is achieved by reducing the number of teacher periods allocated in the plan. Alternatively the financial plan can be modified to increase the FTE value available. N.B. the FTE teacher value required by the deployment is rounded up to one decimal place.		
18	Totals	920	1126			
19	TEACHER IMPLICATIONS					
20	Average Class Size (PTR in the curriculum)		20.43			
21	Contact Ratio		0.78			
22	Average teaching load		19.5			
23	FTE TEACHERS REQUIRED BY THIS DEPLOYMENT		57.8			
24	FTE TEACHERS EMPLOYED		58.00			
25	This value copies from the Summary sheet. Either the deployment plan or the employed value on the SUMMARY DATA sheet should be adjusted until this cell shows green or yellow.Red = insufficient employed staff. Green = employed and deployment match. Yellow = Employed greater than deployment					
26						

This sheet gives a detailed example of the contact ratio idea for users who are not already familiar with it.

Remember the sheet has notes on to help you. —

[illegible]

Secondary Workbook Template – Step-by-step Guide

MODELLING CONTACT sheet

This sheet allows the contact ratio value to be modelled for future years where the teaching staff structure is reasonably well known but the individual teachers are not known. It also allows the user to investigate the extent to which management time changes can modify the contact ratio value once all staff have the appropriate allocation of PPA time.

A O														
This sheet allows the investigation of contact ratio by role to take place and to look at the impact of management time allocations on the overall contact ratio. Full time teachers are entered in the top section and there is a separate section for part time teachers lower down. The part time staff are entered according to their nearest tenth of a week's employment. This approach can produce a slightly more accurate result than entering part time staff as a simple fraction of a full time member of staff given some of the idiosyncrasy schools use in the time part time staff spend teaching. Users are referred to the current guidance on PPA and management time in School Teachers Pay and Conditions of Service. The document concerning Newly Qualified Teachers on the GOV.UK website is also essential reading.														
Cycle length in periods	25	Contact	Non-Contact				Reference values			CALCULATIONS				
Staff by roll (Part time staff listed in categories lower down)	Headcount	FTE	Teaching Load	PPA	MGT	Other	Employed cycle periods per FTE	Check total	PPA %	Timetable contribution	PPA Total	MGT Total	Other Total	Employed Cycle Periods
FULL TIME TEACHERS														
Headteacher	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Deputy Headteacher	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Assistant headteacher	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Head of large curriculum area	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Head of small curriculum area	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Head of pastoral area	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Other teacher role with management responsibility	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Newly Qualified teachers	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Full time classroom teachers	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
PART TIME TEACHERS														
Classroom teachers FTE 0.9	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.8	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.7	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.6	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.5	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.4	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.3	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.2	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Classroom teachers FTE 0.1	0	0	0	0	0	0	0	0	n/a	0	0	0	0	0
Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Average teaching load	0.0													
Contact Ratio	0.0													

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Years 7 to 11 whole school example												
2	Pupil Roll	800											
3	Teacher periods allocated on the timetable	1000											
4	Periods in the timetable cycle	25											
5	Average number of teachers in teaching contact on any one period	40	Calculation: Line 3 divided by line 4										
6	Average number of pupils per teacher on any one period (=AVERAGE CLASS SIZE)	20	Calculation: Line 2 divided by line 5										
7													
8	Post 16 example												
9	Pupil Roll	100											
10	Teacher periods allocated on the timetable	200											
11	Periods in the timetable cycle	25											
12	Average number of teachers in teaching contact on any one period	8	Calculation: Line 10 divided by line 11										
13	Average number of pupils per teacher on any one period (=AVERAGE CLASS SIZE)	12.5	Calculation: Line 9 divided by line 12										
14	Number of periods out of the cycle for which pupils attend lessons on average	20	e.g. if there are 5, 5period option blocks and all pupils attend subjects in four of the five blocks this input is 20										
15	Proportion of the cycle for which pupils attend lessons	0.8	Calculation:line 14 divided by line 11										
16	Average size of a teaching group	10	Calculation:line 13 multiplied by line 15										
17													
18	Average Class Size is the traditional name for the pupil to teacher ratio in the timetable. In a timetable cycle of length w with T teacher periods allocated and a roll of R pupils the calculation is												
19	$\text{Average Class Size} = \frac{Rw}{T}$												
20	This formula is developed stepwise on lines 5 and 6 above to illustrate how it is derived.												
21													
22	Average class size is independent of the number of periods in the timetable cycle so it can be used as a metric to compare the outcome of teacher time in terms of the pupil to teacher ratio between timetables with different cycle lengths.												
23													
24	There is a difference between the Average Class Size and the size of an average teaching group when pupils do not attend all of the timetabled lessons for example in post 16 where there may be some private study periods. The second section of the spreadsheet illustrates this.												
25													
26	In a teacher deployment analysis the average class size for individual year groups can be used to 'check for sense' if the user is aware of the likely range of values. In the use of BASIC and BONUS ideas (see separate spreadsheet)the inventor of the system , T.I.Davies working in 1969 before calculators or computers were available in schools, used a nine period cycle and a reference level of teacher time which he called BASIC as a starting point for curriculum measurements. To simplify calculations he set the BASIC reference level of teacher periods (in a nine period cycle) numerically equal to the roll number divided by 3. Substitution into the equation above ($T = R/3$, $w=9$) shows that this is equivalent to an average class size of 27. It should be noted that this is just a reference point for measuring from and not the ideal basic curriculum provision in a secondary school. The term BASIC is frequently misinterpreted as being an ideal or desirable level of teacher time. It would have been better termed 'Reference level' or 'Zero for measurement of teacher time'.												
27													
28	Average class size cannot be calculated for an allocation of teacher periods that is not associated with a roll number. BASIC and BONUS calculations are also not possible in that situation. The relationship												
29													
30													
31													
32													
33													
34													
35													
36													
37													
38													
39													

Secondary Workbook Template – Step-by-step Guide

BONUS AND BASIC sheet

This sheet explains and illustrates the use of the terms BASIC and BONUS as defined in timetable literature.

Authority. His system was devised so that calculations used small numbers because computers and calculators were not available for use in schools in 1969. Teachers were also allocated to schools using a local PTR based system by the Local Education Authority. His system was based on observations of Welsh secondary schools in 1966 and uses two ideas, BASIC and BONUS.

The original text is very difficult to read and was reinterpreted and added to in timetabling and curriculum courses in the 1970's. Keith Johnson uses this material in his timetabling book, the most recent and clearest account being in Chapter 3 of 'A Timetabler's Cookbook' which is available on the web and is a recommended read for anyone working with timetables or wishing to understand more about them. There are elements in Johnson's account which do not appear in the original Davies text. It is probably fair to say that whilst many people quote Davies and allude to what he is supposed to have written it is clear if the original text is studied that the quoted information is very much second hand, frequently misinterpreted and sometimes actually wrong!

One critical issue is the meaning of the terms BASIC and BONUS. These are still in current use but are frequently misinterpreted or interpreted in a way which can work for the school in question but not in a manner that is necessarily transferable to other schools.

for the avoidance of doubt the terms are:

BASIC: a reference level of teacher time in the timetable. This is used as the point from which the actual allocation of teacher time is measured so that the final answer is a small number. The original definition was equivalent to an average class size of twenty-seven pupils in years 7 to 11 and fifteen in post 16.

The idea of applying BASIC and hence BONUS to post 16 has fallen into disuse due to the complexity of doing so (see Johnson section 5.13 p 76 and Davies p118). The reference level is only applied to year 7 to 11. It is important to remember that BASIC level would give a basic reference level from which teacher time can be measured. It does not mean that this is an ideal or desirable level which would be adequate for curriculum provision. As a measuring point it is synonymous with using sea level as the basis for measuring height or depth.

BONUS: the difference in teacher time between what is actually allocated to the timetable and the BASIC level. It does not therefore mean 'benefit' or anything similar as it can do in everyday language! If the ACTUAL allocation is lower than the BASIC level then the BONUS is a negative number of teacher periods.

In the original form all calculations were referenced to a nine period week as a common starting point making initial calculations common across any group of 11 to 18 schools. Once the initial planning framework had been established it was up to an individual school to convert from the nine period cycle to its actual cycle. Note here that the original model was a planning tool and not a post hoc analysis tool. The nine period cycle is no longer used so to compare the level of bonus between timetable cycles of different lengths the BONUS as a percentage of BASIC is used. This is correctly termed the RELATIVE CURRICULUM BONUS or just the RELATIVE BONUS. Colloquially some users call it the "percentage bonus" which is actually an erroneous expression but nevertheless in fairly common use.

The relative curriculum bonus is used by some schools as a metric to describe or control an aspect of curriculum cost. The average class size can be used to do exactly the same thing. Both these aspects are illustrated in the sample teacher deployment analysis shown below. For simplicity post 16 and separate areas such as Learning support have been omitted. It can be seen how these can be included on the stand alone sheet METRICS

Using BONUS AND BASIC to describe an existing curriculum

Year	Group	Roll	tp allocated to	BASIC	BONUS	e Bonus	Notes describing curriculum structure	e class size
Year 7	150	133	138.3	-5.3	-4.22%	5 classes for 21 periods, 6 Pe groups for 2 periods, 8 Tk groups for 2 periods	28.2	
Year 8	160	154	148.1	5.9	4.02%	6 classes for 23 periods 10 Tk groups for 2 periods	26.0	
Year 9	170	158	167.4	0.6	0.42%	6 classes for 23 periods 10 Tk groups for 2 periods	26.3	
Year 10	165	164	152.8	31.2	20.42%	7 classes for 18 periods 3 option blocks, 3 periods each 8 subjects per block	22.4	
Year 11	180	193	166.7	26.3	15.82%	7 classes for 16 periods 3 option blocks, 3 periods each 8 subjects per block	23.3	
Total	825	822	763.9	58.1	7.62%		25.1	

The Average Class Size column has been added at the end to highlight both similarity and difference. Where the BONUS and Relative Bonus are negative in year 7 the Average Class Size is above 27. This is all that that negative bonus means.

The relative curriculum bonus is actually the percentage of teacher time allocated which changes the average class size from 27

The mathematical link between the two quantities is Average Class size = $\frac{1700}{(100 + \text{Relative Bonus})}$

Alternatively Relative Bonus = $\frac{1700}{\text{ACS}} - 100$

Average class size has the advantage over relative bonus of being applicable from Reception to year 13 provided the distinction between class size and teaching group size is understood in post 16. (see WHAT IS AVERAGE CLASS SIZE sheet)

DEPLOYMENT PROJECTION YEAR

LINKED SHEET NOTES

MODELLING CONTACT

WHAT IS CONTACT RATIO

WHAT IS AVERAGE CLASS SIZE

There are two approaches to planning a curriculum using bonus.

The first is to decide the best timetable structure as indicated in the notes column in the light of the roll number, calculate the tp required then calculate the figures for BASIC, BONUS and RELATIVE BONUS. One then takes a view as to whether that is what is required using the BONUS or RELATIVE bonus figures to see which year groups are getting a larger share of teacher time than others. In essence there is little difference from the table above except a final decision on the teacher contact ratio which converts the tp total into a number of FTE teachers required.

Exactly the same judgement can be arrived at by using Average Class Size instead of BONUS and BASIC but with fewer spreadsheet columns and more comprehensible metric.

The second approach is to define a total curriculum cost envelope for 11 to 16 in terms of a Relative Bonus percentage and a teacher contact ratio. For example the Outwood Grange Academies Trust Annual Report and Finance Statements for the year ended August 31 2016 state "The parameter we set for teaching costs is a 0.79 contact ratio with less than 8% curriculum bonus"

8% curriculum bonus in 11 to 16 means an average class size of 25. Multiplying that by a contact ratio of 0.79 gives a Pupil to Teacher ratio of 19.75. The phrase in the accounts means that if there are 750 pupils in total in years 7 to 11 then just under 38 FTE teachers will be employed to teach the curriculum. If they work to a contact ratio of 0.79 in a timetable cycle of 24 periods the overall teacher period budget will be limited to 750 tp. This coincidence occurs because the average class size that is the same thing as 8% relative curriculum bonus equals the number of periods in the cycle. This can be explored with the section of spreadsheet below.

There is a simpler way of arriving at the same point by simply stating what the PTR the school intends to use will be. That approach is valid across any combination of age ranges and could therefore include post 16 and be extended to primary schools. That approach which bypasses BONUS and BASIC is covered in the AT COST REFERENCING sheet. The second calculation below uses a variation of this where the lower limit for an average class size is used. The average class size multiplied by a contact ratio is the same thing as a PTR value.

Planning parameters and pupil to teacher ratio benchmark result using BONUS and BASIC

Teacher Contact ratio	0.79	User input
Limiting level of relative bonus (enter percentage)	8	User input
Pupil Roll total for years 7 to 11	1000	User input
Periods in the timetable cycle	25	User input
BASIC at average class size of 27	925.9	H83 multiplied by H84 and divided by 27
Total tp available (Basic plus 8% of Basic as B)	1000	H85 increased by percentage in H82 rounded down to the nearest whole
Number of teachers required at contact ratio of	50.7	H86 divided by the product of H84 and H81 and rounded up to 1dp
Pupil to teacher ratio	19.72	H83 divided by H87

The average class size approach. It requires one less calculation line than the previous approach

Planning parameters and pupil to teacher ratio benchmark result Using Average Class Size

Teacher Contact ratio	0.79	User input
Upper limit for Average Class Size	25	User input
Pupil Roll total for years 7 to 11	1000	User input
Periods in the timetable cycle	25	User input
Total tp available	1000	Implied by H95 and divided by H93 rounded down to the nearest whole
Number of teachers required at contact ratio of	50.7	H96 divided by the product of H95 and H92 and rounded up to 1dp
Pupil to teacher ratio	19.72	H94 divided by H97

DEPLOYMENT PROJECTION YEAR

LINKED SHEET NOTES

MODELLING CONTACT

WHAT IS CONTACT RATIO

WHAT IS AVERAGE CLASS SIZE

Secondary Workbook Template – Step-by-step Guide

AT COST REFERENCING sheet

This sheet shows a way of referencing a teacher deployment analysis to the number of teacher periods a school can afford in a balanced budget.

For a given per pupil funding level, a proportion of revenue spend on everything except teachers and an average teacher cost there is a PTR value that the school can afford in a balanced budget. This is explained in the article on the fundamental equation governing ICFP. Since the PTR value is equal to the contact ratio multiplied by the average class size it is possible to rearrange those parameters to give the number of teacher periods on the timetable the school can afford per pupil. In a school where S =Average Teacher cost, w = periods in the timetable cycle, p =proportion of revenue available for teacher cost, c =teacher contact ratio and i is the overall per pupil revenue the periods per pupil in a balanced budget are given by

$$\text{Periods per pupil} = \frac{cwp}{S}$$

This formula can be used in a spreadsheet to give a reference level of per pupil teacher periods. The difference between the actual allocation and the reference level shows the extent to which one part of the school is subsidising or being subsidised by another. What the value of knowing that is an interesting point but notwithstanding that some schools find it a useful thing to know. The sheet below illustrates the idea in an 11 to 18 school.

There are no user inputs on this sheet as it is intended as an illustration of a particular set of figures. The subsidy % can be displayed as a bar chart.

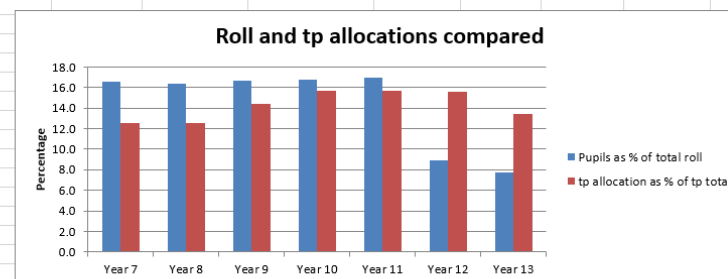
Estimated Average Teacher Cost				£50,000		
Estimated total revenue				£5,000,000		
Estimated spend on everything except teachers (this could include putting some funding on reserve)				£2,000,000		
Proportion of revenue available for teacher cost				0.60		
Periods in timetable cycle				25		
Teacher contact ratio				0.780		
Pupil Roll				913		
Per pupil teacher period allocation at an 'at cost' level (shown to 2 places of decimals but not rounded)				1.28		
Revenue cost of one teacher period				£4,274		
Year /Area	Roll	At cost tp	Actual tp Allocation	Curriculum structure notes	Subsidy	Subsidy as % of total revenue
Year 7	150	192.2	133	5 classes for 21 periods, 6 pe classes for 2 periods, 8 Tk classes for 2 periods	-£253,092	-5.1%
Year 8	155	198.6	154	6 classes for 23 periods, 8 Tk classes for 2 periods	-£190,730	-3.8%
Year 9	145	185.8	133	5 classes for 21 periods, 6 pe classes for 2 periods, 8 Tk classes for 2 periods	-£225,709	-4.5%
Year 10	152	194.8	184	7 classes for 16 periods, 3 option blocks, 3 periods per block 8 subjects per block	-£46,096	-0.9%
Year 11	156	199.9	184	7 classes for 16 periods, 3 option blocks, 3 periods per block 8 subjects per block	-£68,002	-1.4%
Year 12	80	102.5	175	Five five period option blocks, seven subjects per block	£309,747	6.2%
Year 13	75	96.1	150	Five five period option blocks, six subjects per block	£230,292	4.6%
Whole school learning support	0	0.0	25	25tp allocated	£106,838	2.1%
Whole school intervention	0	0.0	20	20 tp allocated	£85,470	1.7%
Tp reserve or overuse (-ve)	0	0.0	12	Positive value= timetabling flexibility. Negative level=teacher overspend	£51,282	1.0%
	913	1170.0	1170			

Secondary Workbook Template – Step-by-step Guide

METRICS sheet

This sheet shows a range of metrics attached to a deployment analysis.

benchmarks. The critical metric is the PTR in relation to the PTR the school can afford. This is alluded to in the AT COST REFERENCING sheet and covered in detail in the article on the fundamental equation.														
FTE teachers employed			59.0											
Total teaching cost			£2,950,000											
Total revenue expenditure			£5,400,000											
Average teacher cost			£50,000											
Periods in timetable cycle			25											
Total Teacher period allocation			1121											
Teacher cost of one tp			£2,632											
Revenue cost of one tp			£4,817											
Average teaching load			19.0											
Teacher contact ratio			0.760											
Pupil Roll			900											
Overall Average class size			20.07											
Overall pupil to teacher ratio			15.25											
Year 7 to 11 pupil roll			750											
Year 7 to 11 BASIC reference level of teacher time			694.44											
Year 7 to 11 ACTUAL tp(Includes whole school periods)			796.00											
Year 7 to 11 BONUS teacher time in tp			101.56											
Year 7 to 11 Relative Bonus (BONUS as % of BASIC)			14.6%											
National Curriculum Year	Pupil Roll	tp Allocation	tp allocation with Whole school areas shared across y7 to y11	Average Class Size	FTE teachers employed in the school	Teacher cost	Revenue Cost	BASIC	BONUS	Relative Bonus	Pupils as % of total roll	tp allocation as percentage of total tp allocation	Teacher cost as % of total teacher cost	Revenue cost as % of total revenue
Year 7	149	133	141	26.42	7.42	£371,053	£679,215	138.0	3.0	2.2%	16.6	12.6	12.6	12.6
Year 8	147	133	141	26.06	7.42	£371,053	£679,215	136.1	4.9	3.6%	16.3	12.6	12.6	12.6
Year 9	150	154	162	23.15	8.53	£426,316	£780,375	138.9	23.1	16.6%	16.7	14.5	14.5	14.5
Year 10	151	168	176	21.45	9.26	£463,158	£847,814	139.8	36.2	25.9%	16.8	15.7	15.7	15.7
Year 11	153	168	176	21.73	9.26	£463,158	£847,814	141.7	34.3	24.2%	17.0	15.7	15.7	15.7
Year 12	80	175	175	11.43	9.21	£460,526	£842,997	n/a	n/a	n/a	8.9	15.6	15.6	15.6
Year 13	70	150	150	11.67	7.89	£394,737	£722,569	n/a	n/a	n/a	7.8	13.4	13.4	13.4
Whole School Areas														
Learning Support			n/a	25										
Intervention activity			n/a	10										
Other teacher contact time			n/a	5										



Secondary Workbook Template – Step-by-step Guide

APPENDIX.

Technical timetabling terms used in this document and in the Excel workbook

There are some essential ideas from timetable theory that may be useful for any school leader not closely acquainted with timetabling to understand. These are outlined here at a level which is hoped is appropriate for ICFP but not necessarily in the detail required for timetabling.

PERIOD

Time in the curriculum is usually measured in a unit called the **period**. The length of a period is usually the length of a single lesson. Some subjects may be allocated multiple periods to allow for longer teaching time for example in Technology or Games.



Secondary Workbook Template – Step-by-step Guide

CYCLE

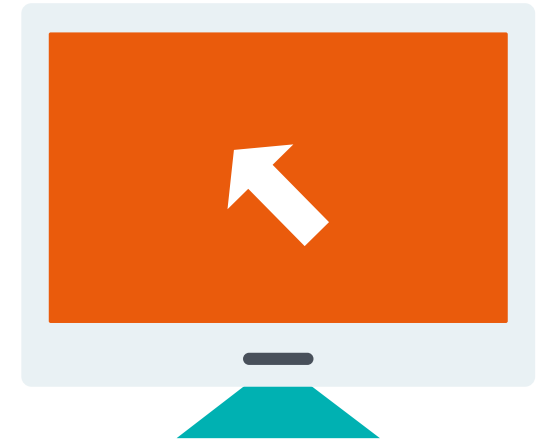
The timetable **cycle** is the number of periods after which the timetable and hence the curriculum structure repeats. A common secondary school timetable cycle consists of twenty five one hour periods spread over five days of a calendar week. Colloquially this is often referred to as a ‘twenty five period week’. There are many different timetable cycles in use in secondary schools some operating over two calendar weeks to allow for a curriculum plan with a higher number of different subjects than can be accommodated in a 25 period cycle. It is not usual to include registration periods, lunch periods or twilight periods as part of the timetable cycle even though they may need to be part of the cycle as it is used in timetable software. Where schools use unequal length periods in their cycle this can be accommodated by considering the cycle as a multiple of the size of the smallest time unit used for a period.



Secondary Workbook Template – Step-by-step Guide

CURRICULUM PLAN

A **curriculum plan** is a detailed blueprint for timetable construction containing detail of time required for different subjects and the number of teachers to be allocated, the organisation patterns used such as setting and option blocks, pupil roll numbers and an indication of how they can be subdivided into classes, and an overview of how all this works within the timetable cycle. Timetable software has its own way of recording a curriculum plan. An Excel workbook can also be used to do this. Reading a curriculum plan is not an essential aspect of ICFP for leaders outside the timetable team but it is certainly desirable. Making the plan an open document can promote a wider understanding of staffing and cost implications of decisions affecting curriculum structure. The most common timetable software in secondary schools is NOVA-T6 and this displays its curriculum plans on the MODEL window. The structure of a curriculum plan can have significant cost implications for the number of specialist teachers a school needs to employ and the cost effectiveness of their use in the timetable.



Secondary Workbook Template – Step-by-step Guide

TEACHER PERIOD

Teacher time on the timetable is measured in **teacher periods**. One teacher period is one teacher working in a planned teaching situation on the timetable for one period. In most cases the teaching situation will be a single teacher teaching a class of pupils. There are also many other situations where teachers teach pupils as part of the timetable such as team teaching, intervention, and learning support.



CONTACT TIME and NON-CONTACT TIME

The teacher periods supplied by a teacher on the timetable are **contact time** and referred to as contact periods. Care must be taken when using timetable software to calculate the number of contact periods on a timetable. Firstly, some schools record learning support and intervention periods in a way which appears in the software total as non-contact time. Secondly in NOVA-T6 in particular the totals on the Analysis page are shown in ‘class periods’ and not ‘teacher periods’. Whether or not these two things are the same or different depends upon the way in which the software has been used by the scheduler.

Secondary Workbook Template – Step-by-step Guide

Teachers have two types of time on their timetables which form part of the timetable cycle. (Note this usually excludes registration, assembly and similar activity) The time can be classified as either **contact time** or **non-contact time**.

Contact time, as indicated above is planned teaching contact with pupils as part of the curriculum plan. Non-contact time is PPA (Preparation, Planning and Assessment) time allocated to all teachers who have a teaching load of contact periods, management time, headship time and Newly Qualified Teacher (NQT) time. Regulations covering PPA, management time and headship are set out in the ‘School Teachers Pay and Conditions Document’¹ (STPCD) in paragraphs 52.5, 52.6 and 47.2 respectively. The reduction of teaching load for NQTs is covered by the document ‘Induction for newly qualified teachers’ in paragraph 2.19². School leaders are strongly recommended to check the current version of these documents. A school may also decide to allocate additional non-contact time to teachers for reasons specific to the school.

¹ Paragraph references are to the 2018 edition

² April 2018 edition



Secondary Workbook Template – Step-by-step Guide

CONTACT RATIO

The **contact ratio** is a critical variable used in ICFP and is also one of the five variables in the fundamental equation referred to on the landing page for these notes. Aspects of contact ratio are illustrated in the Excel workbook that accompanies these notes. The contact ratio is the proportion of the cycle teachers spend in teaching contact taken as an average across all teachers. The contact ratio can be used as a comparison metric between schools as it is independent of the number of periods in the timetable cycle in a school. It is false to assume that there is a fixed value of contact ratio that is suitable for all types of school. Once all teachers have a minimum allocation of PPA time the key driver of contact ratio is the level of Management and Headship time allocated to staff entitled to it. Paragraph 52.4 in STPCD covers the need to have regard to work/life balance.



Secondary Workbook Template – Step-by-step Guide

AVERAGE TEACHING LOAD

The **average teaching load** or **average load** is the number of periods of contact time teachers have as an average across all staff employed as teachers. Some staff such as a headteacher may have an actual teaching load of zero whilst others may have one close to 90% of the timetable cycle. There will be a range of teaching loads between these limits and the average of all of them is the average teaching load. As with any average, care must be exercised in interpreting its meaning. Because the average teaching load relates to the timetable cycle in the school it is not directly comparable with a teaching load in a different timetable cycle. The average teaching load can be calculated by dividing the total number of contact periods on the timetable by the FTE number of teachers.

The contact ratio mentioned above is calculated by dividing the average load by the length of the timetable cycle in periods. This result can be compared in different timetable cycles.

Secondary Workbook Template – Step-by-step Guide

DEPLOYMENT ANALYSIS

This is also called ‘**Staff Deployment**’ or ‘**Staff Deployment Analysis**’ for historic reasons. It usually only applies to teachers although in some secondary schools and certainly in most primary schools it applies to teachers and staff acting in a teacher role such as HLTA staff.

It is usually drawn up in the form of a table listing the different areas of the school such as year groups and alongside those listing the pupil roll and the teacher time allocated on the timetable.

It comes in two forms. The first form is an analysis of an existing timetable. In this case the FTE total for teachers is a known quantity as are all the teacher period (tp) allocations to different curriculum areas such as year groups. The analysis allows the extraction of many metrics particularly if financial information such as the average cost of a teacher is included. There are several examples in the workbook accompanying these notes. Readers are also referred to Keith Johnson’s Timetabling text 3Chapter 5 and in particular section 5.8.

3 Johnson,

The second form is more in keeping with the original idea from T I Davies which he referred to as the schools ‘longitudinal matrix’. See chapter 10 of School Organisation 4 and in particular pages 123 onwards. This is a planning version where a desired teacher time allocation is distributed across the different areas of the school to either arrive at a total level of teacher time or to work to a predetermined teacher time limit. The teacher time total in teacher periods is

then used with a target value for teacher contact ratio to determine the total number of FTE teachers required. Where the number of FTE teachers the school intends to employ has already been decided a contact ratio value determines the total teacher period budget for the deployment analysis. This second approach mirrors the activity in schools before 1988. In School Organisation Davies illustrates this approach using his Bonus and Basic system for 11 to 16 schools. This is covered in the following section on BONUS, BASIC and RELATIVE BONUS

Whatever approach is used, the deployment analysis in its planning form provides a series of cost envelopes within which curriculum plans for the different areas of the school must be constructed.

3 Johnson, K., *Timetabling, A Timetabler’s Cookbook*, October ReSolutions Limited, 2009
, ISBN 978-0-9561161-0-9

4 Davies, T.I., *School Organisation*, Pergamon 1969, ISBN 08-013419-X

Secondary Workbook Template – Step-by-step Guide

BONUS, BASIC and RELATIVE BONUS

This system of planning a curriculum was devised by T I Davies in the 1960's when analysing curricula in Welsh secondary schools and published in his 1969 book *School Organisation*⁵. It was intended as a method of sketching out a curriculum framework, common to all secondary schools, using small simple numbers which could be benchmarked and also support dialogue with a Local Education Authority about the allocation of teachers through a PTR based formula.

The common planning basis for all schools was a nine period timetable cycle and the introduction of the ideas of **basic** and **bonus** was to produce small numbers for calculations. In 1969 calculations had to be carried out on paper using basic arithmetic as calculators and computers were not available. Small numbers were therefore an advantage. This is no longer relevant given the availability of spreadsheets and pocket calculators. Once a planning framework had been established it could be converted into the timetable cycle used in any individual school. For benchmarking purposes Davies includes over 30 pages of data called 'norms' derived from activity in Welsh schools in 1966 in his text.

Some of the original ideas from Davies were developed in curriculum and timetable courses between 1970 and 1980 and Keith Johnson uses some of these developments in his *Timetabling*⁶ text.

Some schools and most notably the Outwood Grange Academies Trust⁷ have used interpretations and aspects of this approach in the recent past.

⁵ Davies, T.I. op cit

⁶ Johnson.K., op cit

⁷ Outwood Grange Academies Trust Annual Report and Financial Statements for yearend August 2016 See 'Teaching and Support Staff Cost page 21

Secondary Workbook Template – Step-by-step Guide

Basic is a reference point from which teacher time is measured. In the Davies model this was the number of teacher periods numerically equal to the pupil roll divided by three in a nine period cycle. That is exactly the same thing in today's schools as the teacher periods needed to give an average class size of 27. It must be emphasised that **basic** was never intended as the defining line for a standard and adequate curriculum although it has been interpreted as that by some users since 1970. It is simply a reference line for measurement like sea level is used for measuring height or depth in Geography. Keith Johnson also explains **basic** in a similar manner to this on page 69 of his Timetabling text. Davies starts his original definition on page 90 of School Organisation with the statement, "From the viewpoint necessary to this sketching technique, every actual school curriculum is a deviant from a hypothetical, basic curriculum, and the extent of its deviation depends on the size of the curriculum's bonus" He then goes on to state that he is trying to "...set up a basic curriculum model such that the actual curricula wherever they are found will deviate from the basic model by only a small margin of bonus classes" To simplify the arithmetic in a nine period cycle Davies settles on an average class size of 27 being his 'basic' curriculum model.

The actual teacher time allocated in a school is a matter for the school to decide. The difference between the actual time in teacher periods and the **basic** reference line is called **bonus**.

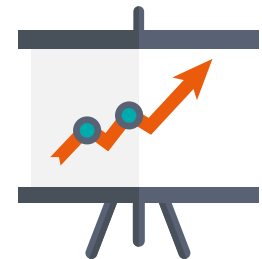


Secondary Workbook Template – Step-by-step Guide

The advantage in using this method is that the numbers for the teacher periods used to describe the curriculum in terms of bonus are a lot smaller than the actual total teacher periods used. The disadvantages of this approach are that the basic reference line is only appropriate to 11 to 16 school; when the actual teacher period allocation is lower than the basic reference level the bonus is negative, which can be confusing to some users; and the misunderstandings caused when users apply their own meanings to the terms bonus and basic. This last point is not an issue if the school operates its system alone but if it is shared across other schools without adequate definition of terms it leads to potential difficulties.

An additional dimension described in Keith Johnson's text⁸ is the idea of **relative bonus** (Outwood Grange Accounts cite this as "8% curriculum bonus"). Bonus is specific to the timetable cycle in the school unless one goes back to the Davies nine period common timetable cycle. Relative bonus can be used no matter what the timetable cycle is. Like contact ratio and average class size it is independent of the number of periods in the cycle. **The relative bonus is the bonus as a percentage of the basic.**

⁸ Johnson, K. op cit page pages 69 and 70



Secondary Workbook Template – Step-by-step Guide

The reference line of an average class size of 27 is not relevant to a post 16 curriculum. In fact Davies proposed a post 16 method based on an average class size of 15 but no one uses it as it gets too complex to be useful. Further complexities can arise in post 16 because of private study time on student timetables. Hence the common approach is that this method does not apply to post 16. Davies did not consider Primary Schools and neither does Johnson. It is also questionable how appropriate the approach is for primary schools without some modification. There is a similar approach which can be used using the terms bonus and basic and this is included in the Technical Notes (Primary Schools) but not developed further here.



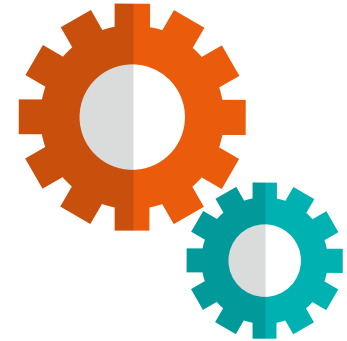
As a final point it should be noted that the idea outlined below, Average Class Size, which also comes from Davies⁹, can be used in place of the bonus and basic ideas and is also one which applies across primary schools and post 16. It is also more intuitive and simpler to apply than the basic/bonus method.

⁹ Davies, T.I. op cit

Secondary Workbook Template – Step-by-step Guide

AVERAGE CLASS SIZE

Average Class Size is the traditional term for the pupil to teacher ratio in the timetable. Where teacher periods are allocated to activities that do not have a roll specifically allocated to them such as Learning Support or Intervention an average class size cannot be calculated for the specific teacher period allocation unless those periods are notionally distributed across the year groups where the time will be used. The average class size can always be calculated for the whole school where all the teacher periods are included.



The overall average class size for a school is given by

$$\text{Average Class Size} = \frac{\text{Pupil roll} \times \text{periods in the cycle}}{\text{teacher periods on the timetable}}$$

Secondary Workbook Template – Step-by-step Guide

In post 16 where pupils do not necessarily attend all periods the statistic is still valid but it is larger than the average size of a teaching group. Davies draws this distinction on page 94 of School Organisation by reference to ‘classes as organised’ (i.e. the timetable) and ‘classes as taught’ (i.e. the actual attendees at each class.) For example if the average class size in post 16 is 20 but pupils only attend four out of five lessons then the average size of a teaching group is 16. Average class size is one of the values in the fundamental equation.

Average class size can be converted to a relative curriculum bonus and vice versa using the relationship

$$\text{Average Class Size} = \frac{2700}{(100 + \text{Relative Bonus})}$$

For example a relative bonus of 8% means the same thing as an average class size in 11 to 16 (a.k.a. ‘the main school’ in secondary) of 25.



Secondary Workbook Template – Step-by-step Guide

THE FUNDAMENTAL EQUATION

There is a more detailed paper with worked examples on this which can be downloaded from the original landing page.

In short if the average teacher cost is divided by the product of the per pupil revenue and the proportion of that revenue available for teacher cost the result is the pupil to teacher ratio in a balanced budget. The pupil to teacher ratio equals the teacher contact ratio multiplied by the Average class size in the timetable.

Eliminating the pupil to teacher ratio from these two statements gives the fundamental relationship that governs all schools in terms of finance and curriculum.

This in effect makes the pupil to teacher ratio the key summary metric in any school. Caution must be exercised in the view of such a metric as schools with identical overall roll numbers may not be strictly similar for the purpose of comparing PTR values unless the distribution of the pupil roll across year groups is taken into account.

