



School Resource Management

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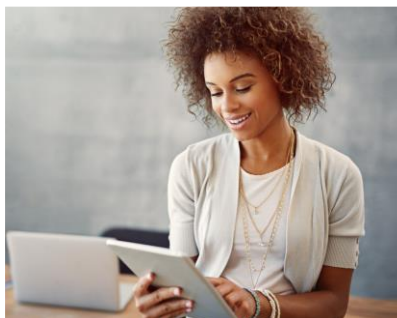
Integrated Curriculum Financial Planning (ICFP) using DfE Tools



Welcome & Introduction




- DfE SRM Short Courses
- Your Trainer
- Entrust Overview
- How the session will work – Resource Pack
- Aims of the Session



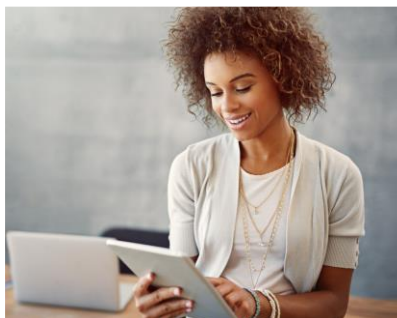
www.education-space.co.uk/SRM/

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Welcome & Introduction



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www.education-space.co.uk/SRM/

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Learning Outcomes





Understanding Integrated Curriculum Financial Planning



What is available on the DfE ICFP website



How to utilise ICFP within my organisation



How to use the ICFP Tools

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Slide 5





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Introduction to ICFP

Introduction to ICFP

[Introduction to ICFP](#)

POLL





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Historical Budgeting



Pros	Cons
Easiest method	Spend the budget regardless
Stability	"We've always done it that way"

"The six most expensive words in education – 'we've always done it that way'"

Abdul Chohan, co-founder of The Olive Tree Free School

"The most damaging phrase in the language is 'It's always been done that way.'"

Rear Admiral Grace Hopper

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Zero-Based Budgeting

Pros	Cons
Accurately allocate budgets every year	Significant increase in time taken to prepare budget
Encourages creativity and new ideas	Conflicts

Consideration: STAFF 80%!! What about the curriculum?



ICFP is a data-driven approach to planning a school's staffing structure, which involves:

- "It has proven invaluable to headteachers and school leaders by acting as an effective, yet flexible, tool to ensure that the right staff are in the right place at the right time."*



Lord Agnew, former Academies Minister

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Lord Agnew, former Academies Minister

Integrated Curriculum Financial Planning



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What ICFP can do



- You can use ICFP in any school
- It will increase your awareness of:
 - How you spend your money
 - What you spend your money on
 - What factors have a significant impact on your spending
- You will have access to a range of comparable financial KPIs that link to the curriculum
- Calculate and analyse key ratios
- Allows you to make the money work for the curriculum rather than the other way around

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Integrated Curriculum Financial Planning



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Contents

- 

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Starting Point

-



7-Step Guide



Executive Summary

- Commit time and gather the right team
- Get the current data right
- Have a plan and be happy with assumptions
- Prepare options based on results
- work with School Development Plan



7-Step Guide

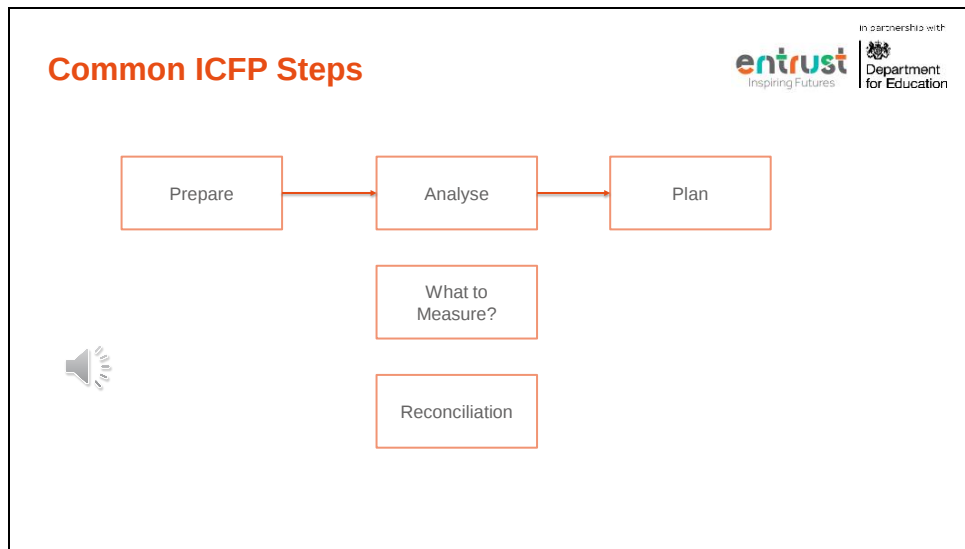


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Executive Summary

- Commit time and gather the right team
- Get the current data right
- Have a plan and be happy with assumptions
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- work with School Development Plan





Prepare

- Decide who will be involved
- Make sure the team understands ICFP
- Assess current situation
- Pick a tool

COMMON TERMS

BASIC PRINCIPLES

- make sure school leaders, academy trustees and governors understand [common ICFP terms](#) (PDF, 202KB, 9 pages)

See the [basic principles of ICFP](#) (PDF, 179KB, 10 pages) to help you prepare.



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Analyse



- What is the curriculum you wish to provide
- Measure and Benchmark key metrics
- Assumptions around the medium-term
 - Pupil Numbers
 - Pupil Needs
 - Funding
 - Costs
 - Staffing

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Plan



- Make sure staffing and curriculum plans are reconciled and affordable
- Strategic Plan
- Reviews – Living Document

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What to measure



- Key Metrics
- Equations and Workbooks
- Self-Assessment Tool



Reconciliation



- Affordable teachers = Needed teachers?
- Workload Reduction Toolkit



[View My Financial Insights - ICFP](#)



Curriculum and financial planning (ICFP)

A table will be generated giving a snapshot of the future finance position based on the data which has been inputted.

Your finance data

Academic year	2018/2019	2019/2020	2020/2021	
Total teacher costs	£641,909	£654,738	£667,833	Change
Total other costs	£870,595	£888,007	£905,767	Change
Total revenue	£969,000	£1,013,091	£1,059,160	Change
Total expenditure (all costs combined)	£1,512,496	£1,542,745	£1,573,600	
Revenue per pupil	£5,127	£5,332	£5,545	
Average teacher cost	£64,190	£65,474	£66,783	
Affordable pupil to teacher ratio	123.3	99.5	83.2	
In-year balance	£543,496	£529,654	£514,440	
Cumulative balance	£0	£529,654	£1,044,094	
Teacher costs as a percentage of income	66.24%	64.63%	63.05%	
Teacher costs as a percentage of costs	42.44%	42.44%	42.44%	

Detailed guidance on how ICFP can help you, as well as other ICFP tools, can be found at: <https://www.gov.uk/guidance/integrated-curriculum-and-financial-planning-icfp>

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ICFP Tools



ICFP Tools



- Primary and Secondary School Workbook
- Pioneer Academy Trust – Primary School variant
- Others on market
- Videos of real-life examples



ICFP Tools

- Excel Walkthrough
- Start with Data Checklist from Resource Pack
- Will help with Spreadsheet Completion
- Guides to spreadsheets available on DfE ICFP Website



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Data Checklist for ICFP

Data required	Details	Where to find it?	Values
Financial data for <i>current academic year</i>			
Total revenue	Current academic year	Finance Report	(£4,837,800)
Total teacher salaries	Teaching staff total expenditure for current year	Finance Report	(£2,876,500)
Total other costs	all other expenditure less teaching cost	Finance Report	(£1,850,500)
B/E deficit/surplus	Brought forward balance from previous year	Finance Report	(£12.876)
FTE Teachers	Full time equivalent teachers	Payroll/budget report	58.0
Financial data for <i>planned academic year</i>			
Estimated total revenue	Future year	Budget forecast	(£4,682,635)
Estimated expenditure except teaching costs	All other costs of expenditure including any resources to be held in reserve	Budget forecast	(£1,971,390)
Estimated percentage change to teacher cost	percentage decrease as % from the previous year	Budget forecast	6.0
Proposed number of teachers to be employed	Number of teachers predicted to be deployed	Budget forecast	61.0
Curriculum data for <i>current academic year</i>			
Total No. of teaching periods (TP)	Total number of timetabled teaching periods for current year	Curriculum software/curriculum lead	1240
Timetable cycle	Length of timetable cycle (usually 25 period for secondary and 10 periods for primary)	Curriculum software/curriculum lead	25
Total NOR	Total number of pupils on roll in September of current year (total and by year group)	Census/ MIS system	1278
Curriculum data for <i>planned academic year</i>			
Total estimated pupils on roll	Forecasted pupil numbers (total and by year group)	LA information/ budgeting software	1345
Target contact teacher ratio	The best practice contact ratio is 0.78	Use this as your starting point	0.78
Timetable cycle	Timetable cycle for planned academic year	Curriculum software/curriculum lead	25

ICFP Tools – Stepwise Overview

Finance data and calculations from the current 'KNOWN' academic year at typical point in time (e.g. October 1st)		
Total available revenue for the KNOWN academic year		User input line
Total expenditure on teacher salary plus on cost in the KNOWN academic year		User input line
Total expenditure on everything except teacher costs in the KNOWN academic year		User input line
In year balance for the KNOWN academic year	£0	Calculation: Sum of lines 1
Carry forward or Deficit (enter as negative) brought into the KNOWN year from previous years		User input line (negative v
Cumulative balance at the end of the KNOWN year	£0	Calculation: Sum of lines 1
FTE number of teachers in the KNOWN academic year		User input line
Average Teacher cost in the KNOWN academic year	#DIV/0!	Calculation: Line 15 divided
Projected finance data and calculations for the PLANNED academic year		
Estimated available revenue for the PLANNED academic year (Excluding carry forward or deficit)		User input line
Percentage change in revenue from KNOWN year (above) to PLANNED year	#DIV/0!	Calculation: Change from li
Estimated minimum spend on everything except teacher costs for the PLANNED academic year (Could include a planned reserve)		User input line
Percentage change in minimum spend on everything except teacher costs from KNOWN year (above) to PLANNED year	#DIV/0!	Calculation: Change from li
In year revenue available for teaching costs	£0	Calculation: Line 25 subtrac
Average teacher cost copied from the KNOWN ACADEMIC YEAR above	#DIV/0!	Value copied from line 21
Estimated percentage change in average teacher cost from the KNOWN ACADEMIC YEAR to the PLANNED ACADEMIC YEAR (enter reduction as -ve)		User input line
Estimated average teacher cost for the PLANNED ACADEMIC YEAR	#DIV/0!	Calculation: line 20 modifi
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)	#DIV/0!	Calculation: Line 28 divided
Carry forward or deficit (shown as negative) from known to PLANNED ACADEMIC YEAR copied from above	£0	Value copied from line 19
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)	#DIV/0!	Calculation: line 33 divided
Approximate FTE teachers required in the PLANNED ACADEMIC YEAR for approximate zero cumulative balance at the end of that year (CALLED CUMULATIVE FTE)	#DIV/0!	Calculation: Sum of line 32
Proposed number of teachers to be employed in the PLANNED ACADEMIC YEAR (A user decision guided by the information above) (CALLED FINANCE FTE)		User input line

ICFP Tools – Stepwise Overview



Finance data and calculations from the current 'KNOWN' academic year at typical point in time (e.g. October 1st)		
Total available revenue for the KNOWN academic year	£4,837,800	User input line
Total expenditure on teacher salary plus cost in the KNOWN academic year	£2,880,000	User input line
Total expenditure on everything except teacher costs in the KNOWN academic year	£1,876,500	User input line
In-year balance for the KNOWN academic year	£961,300	Calculation: Sum of lines 15 and 16
Carry forward or Deficit (enter as negative) brought into the KNOWN year from previous years	£12,876	User input line (negative value inputs)
Cumulative balance at the end of the KNOWN year	£974,176	Calculation: Sum of lines 17 and 18
FTE number of teachers in the KNOWN academic year	58.0	User input line
Average Teacher cost in the KNOWN academic year	£49,855	Calculation: Line 15 divided by line 20

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ICFP Tools – Stepwise Overview

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23	Projected finance data and calculations for the PLANNED academic year	
24	Estimated available revenue for the PLANNED academic year (Excluding carry forward or deficit)	£5,037,635
25	Percentage change in revenue from KNOWN year (above) to PLANNED year	4.13%
26	Estimated minimum spend on everything except teacher costs for the PLANNED academic year (Could include a planned reserve)	£1,873,300
27	Percentage change in minimum spend on everything except teacher costs from KNOWN year (above) to PLANNED year	-0.17%
28	In year revenue available for teaching costs	£3,164,335
29	Average teacher cost copied from the KNOWN ACADEMIC YEAR above	£49,655
30	Estimated percentage change in average teacher cost from the KNOWN ACADEMIC YEAR to the PLANNED ACADEMIC YEAR (enter reduction as -ve)	4.0
31	Estimated average teacher cost for the PLANNED ACADEMIC YEAR	£51,641
32	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
33	Carry forward or deficit (shown as negative) from known to PLANNED ACADEMIC YEAR copied from above	£94,176
34	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)	1.8
35	Approximate FTE teachers required in the PLANNED ACADEMIC YEAR for approximate zero cumulative balance at the end of that year (CALLED CUMULATIVE FTE)	63.0
36	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
37		

30	Estimated percentage change in average teacher cost from the KNOWN ACADEMIC YEAR to the PLANNED ACADEMIC YEAR (enter reduction as -ve)	0.0
31	Estimated average teacher cost for the PLANNED ACADEMIC YEAR	£49,655
32	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)	63.7

ICFP Tools – Stepwise Overview

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ICFP Tools – Stepwise Overview

Curriculum data for the KNOWN academic year at the same point in time (e.g. October 1st)		
Total number of teacher periods on the timetable in the KNOWN ACADEMIC YEAR		User input line
Length of timetable cycle in the KNOWN ACADEMIC YEAR		User input line
TTS Teachers in the KNOWN ACADEMIC YEAR Copied from the finance section above	58.0	Value copied from line 20 above
Average teaching load in the KNOWN ACADEMIC YEAR	0.00	Calculation: Line 39 divided by line 41 show
Teacher contact ratio in the KNOWN ACADEMIC YEAR	#DIV/0!	Calculation: line 42 divided by line 40 show
Total pupils on roll in September of the KNOWN ACADEMIC YEAR		User input line
Average class size (pupil to teacher ratio in the classroom) in the KNOWN ACADEMIC YEAR	#DIV/0!	Calculation: line 44 multiplied by line 40 an
Pupil to teacher ratio (PTR)in the school in the KNOWN ACADEMIC YEAR	0.00	Calculation: line 44 divided by line 41 n.b.
Curriculum data for the PLANNED academic year		
Total estimated pupils on roll at September of the PLANNED ACADEMIC YEAR		User input line
Target teacher contact ratio for the PLANNED ACADEMIC YEAR		User input line
Timetable cycle for the PLANNED ACADEMIC YEAR		User input line
Average teacher load for the PLANNED ACADEMIC YEAR	0.00	Calculation: Line 50 multiplied by line 51

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ICFP Tools – Stepwise Overview

Curriculum data for the KNOWN academic year at the same point in time (e.g. October 1st)	
Total number of teacher periods on the timetable in the KNOWN ACADEMIC YEAR	1,240
Length of timetable cycle in the KNOWN ACADEMIC YEAR	25
FTE Teachers in the KNOWN ACADEMIC YEAR Copied from the finance section above	58.0
Average teaching load in the KNOWN ACADEMIC YEAR	21.38
Teacher contact ratio in the KNOWN ACADEMIC YEAR	0.8555
Total pupils on roll in September of the KNOWN ACADEMIC YEAR	1,278
Average class size (pupil to teacher ratio in the classroom) in the KNOWN ACADEMIC YEAR	25.77
Pupil to teacher ratio (PTR) in the school in the KNOWN ACADEMIC YEAR	22.03

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ICFP Tools – Stepwise Overview

Curriculum data for the PLANNED academic year	
Total estimated pupils on roll at September of the PLANNED ACADEMIC YEAR	1,345
Target teacher contact ratio for the PLANNED ACADEMIC YEAR	0.780
Timetable cycle for the PLANNED ACADEMIC YEAR	25
Average teacher load for the PLANNED ACADEMIC YEAR	19.50

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Total number of teacher periods on the timetable in the KNOWN ACADEMIC YEAR	1,240
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Curriculum impact for the PLANNED academic year based on different numbers of Teachers					
	With 10 Year FTE	With CUMULATIVE FTE	With 12 FTE	With FINANCE FTE	User input FTE (Test Value)
FTE Teachers	58.1	60.1	61.0		
PTR	23.07	22.37	22.05		
Average class size for target teacher contact ratio	23.07	22.37	22.05		
Teacher period budget (tp) at target teacher contact ratio	1136	1172	1187		
Relative bonus (ONLY APPLICABLE IF THE SCHOOL IS IN 11 to 16 SCHOOL) SEE NOTE LINKED TO CELL	-8.7%	-5.9%	-4.3%		
Financial Impact of FTE value on 11 YEAR BALANCE shown as a possible reserve (positive) or deficit (negative)	£0	£694,176	£139,452	£310,692	
Financial Impact of FTE value on CUMULATIVE BALANCE shown as a possible reserve (positive) or deficit (negative)	£94,176	£0	£64,256	£134,868	

Curriculum Impact for the PLANNED academic year based on different numbers of Teachers					
	With IN YEAR FTE	With CUMULATIVE FTE	With FTE	With FINANCE	User input FTE (Test Value)
FTE Teachers	61.2	63.0		61.0	61.6
PTR	21.98	21.34	22.05	21.35	21.35
Average class size for target teacher contact ratio	28.18	27.36	28.27	27.17	27.17
Teacher period budget (tp), at target teacher contact ratio	1193	1228	1189	1240	1240
Relative bonus (ONLY APPLICABLE IF THE SCHOOL IS A11 to 16 SCHOOL) SEE NOTE LINKED TO CELL	-4.2%	-4.5%	-4.3%	-4.6%	-4.6%
Financial Impact of FTE value on 11 YEAR BALANCE shown as a possible reserve (positive) or deficit (negative)	£0	-£94.176	£10.328	-£123.899	
Financial Impact of FTE value on CUMULATIVE BALANCE shown as a possible reserve (positive) or deficit (negative)	£94.176	£0	£104.504	-£29.763	



ICFP Tools – Summary Data

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Year in which the academic year starts	BASE YEAR	Planned year	Projection year
		1	2
PUPIL ROLL BY YEAR GROUP ESTIMATES			
Year 7			
Year 8			
Year 9			
Year 10			
Year 11			
Year 12			
Year 13			
(Check for sense line) Totals	0	0	0
CURRICULUM DATA			
FTE Teachers employed (or planned to be employed in future years) COPIED FROM LINE 20 below	0.0	0.0	0.0
FTE Teachers Required in future years (Copied from the DEPLOYMENT SHEETS)	N/A	#DIV/0!	#DIV/0!
Contact ratio from DEPLOYMENT SHEETS (Shown to 2 decimal places)	#DIV/0!	0.00	0.00
Length of timetable cycle (Copied from the DEPLOYMENT SHEETS)	0	0	0
Average teaching load (Copied from the DEPLOYMENT SHEETS) Shown to 2 decimal places	#DIV/0!	0.00	0.00
Average class size i.e. pupil to teacher ratio in the curriculum (Copied from DEPLOYMENT SHEETS) shown to 2 decimal places	#DIV/0!	#DIV/0!	#DIV/0!
EXPENDITURE SUMMARY			
FTE Teachers employed (or planned to be employed in future years)			
Total Teacher Cost Including on costs		£0	£0
Total Educational Support Staff cost including on Costs		#DIV/0!	#DIV/0!
FTE Educational Support Staff Employed			
Total Admin and Clerical Staff cost including on costs		#DIV/0!	#DIV/0!
FTE Admin and Clerical Staff Employed			
Total of all other employed staff costs including on costs		#DIV/0!	#DIV/0!
FTE total of all other staff employed			
Total of all other revenue expenditure expenditure (i.e. all expenditure not included in the Total Teacher Cost)		£0	£0
(Check for sense line) Total In Year Expenditure	£0	#DIV/0!	#DIV/0!
(Check for sense line) In year expenditure per pupil	£0	£0	£0

ICFP Tools – Summary Data

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	BASE YEAR	Planned year	Projection year
Year in which the academic year starts	2020	2021	2022
PUPIL ROLL BY YEAR GROUP ESTIMATES			
Year 7	270	257	270
Year 8	273	270	257
Year 9	275	273	270
Year 10	270	275	273
Year 11	190	270	275
Year 12			
Year 13			
(Check for sense line) Totals	1278	1345	1345
CURRICULUM DATA			
FTE Teachers employed (or planned to be employed in future years) COPIED FROM LINE 20 below	58.0	60.0	63.0
FTE Teachers Required in future years (Copied from the DEPLOYMENT SHEETS)	N/A	#DIV/0!	#DIV/0!
Contact ratio from DEPLOYMENT SHEETS (Shown to 2 decimal places)	#DIV/0!	0.00	0.00
Length of timetable cycle (Copied from the DEPLOYMENT SHEETS)	0	0	0
Average teaching load (Copied from the DEPLOYMENT SHEETS) Shown to 2 decimal places	0.00	0.00	0.00
Average class size i.e. pupil to teacher ratio in the curriculum (Copied from DEPLOYMENT SHEETS) shown to 2 decimal places	#DIV/0!	#DIV/0!	#DIV/0!



ICFP Tools – Summary Data



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EXPENDITURE SUMMARY			
FTE Teachers employed (or planned to be employed in future years)	58.0	60.0	63.0
Total Teacher Cost Including on costs	£2,880,000	£3,098,483	£3,344,502
Total Educational Support Staff cost including on Costs	£380,989	£440,614	£503,279
FTE Educational Support Staff Employed	16.0	18.0	20.0
Total Admin and Clerical Staff cost including on costs	£350,000	£359,800	£369,874
FTE Admin and Clerical Staff Employed	10.0	10.0	10.0
Total of all other employed staff costs including on costs	£154,608	£198,671	£204,234
FTE total of all other staff employed	4.0	5.0	5.0
Total of all other revenue expenditure expenditure (i.e. all expenditure not included in the Total Teacher Cost)	£990,903	£1,010,721	£1,030,935
(Check for sense line) Total Year Expenditure	£4,756,500	£5,108,289	£5,452,825
(Check for sense line) In year expenditure per pupil	£3,722	£3,798	£4,054

[illegible]

ICFP Tools – Summary Data

REVENUE SUMMARY			
Total in year revenue (exclude any carry forward or deficit)			
(Check for sense line) Per pupil revenue	£0	#VALUE!	#VALUE!
(Check for sense line) Average Teacher Cost	£49,655	£49,655	£49,655
(Check for sense line) Average Educational Support Staff Cost	£23,812	£23,812	£23,812
(Check for sense line) Average Admin Staff Cost	£35,000	£35,000	£35,000
(Check for sense line) Average All Other Employed staff cost	£38,652	£38,652	£38,652
In Year Balance	-£4,756,500	-£4,942,086	-£5,138,675
Carry forward or deficit (enter as negative) from previous years		N/A	N/A
Cumulative Balance	-£4,756,500	-£9,698,586	-£14,837,261
PERCENTAGE CHANGES IN REVENUE AND COSTS FROM PREVIOUS YEAR			
Percentage change in Average Teacher Cost	N/A		
Percentage change in Educational Support staff cost	N/A		
Percentage change in Admin and Clerical staff cost	N/A		
Percentage change in All Other Employed Staff cost	N/A		
Percentage change in all other revenue expenditure	N/A		
Percentage change in per pupil revenue	N/A	N/A	N/A

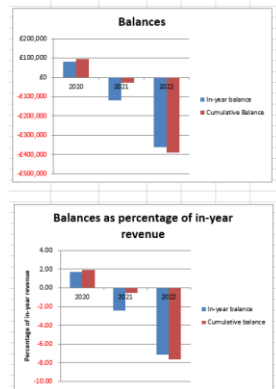


ICFP Tools – Summary Data

SUMMARY STATISTICS (Example potential KPI and benchmark values)			
Per Pupil Revenue (in Year)	£3,785	£3,787	£3,787
Average Teacher Cost	£49,655	£51,641	£53,087
In year balance as a percentage of in year revenue	1.68	-2.42	-7.13
Cumulative balance as a percentage of the in year revenue	1.95	-0.53	-7.65
Pupil to teacher ratio (This is the number of pupils on roll divided by the number of teachers employed)	22.03448	22.41667	21.34921
Teacher contact ratio	#DIV/0!	0.00	0.00
Average Class Size for PTR and Contact ratio on previous two lines	#DIV/0!	n/a	n/a
Average Class Size on DEPLOYMENT SHEETS (see comment attached to cell)	#DIV/0!	#DIV/0!	#DIV/0!
Proportion of in year revenue spent on teaching staff	60%	62%	66%
Proportion of in year revenue available for teaching in a balanced budget if all other costs are fixed	61.2%	59.7%	58.6%
PTR value in a balanced budget based on in year revenue	21.4	22.8	23.9
AFFORDABLE FTE TEACHERS in a balanced budget (Shown to 1 decimal place)	59.6	58.9	56.2
FTE TEACHERS EMPLOYED	58.0	60.0	63.0
Teachers employed to Ed support staff ratio	3.6	3.3	3.2
All staff to admin staff ratio	8.8	9.3	9.8
Pupil to Ed support staff ratio	79.9	74.7	67.3
Pupil to adult ratio	14.5	14.5	13.7
Proportion of revenue spent on staff costs	77.8%	82.2%	86.9%
Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	#DIV/0!	#DIV/0!	#DIV/0!
Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	#DIV/0!	#DIV/0!	#DIV/0!



ICFP Tools – Summary Data

[illegible]

ICFP Tools – Teacher Deployment



TEACHER DEPLOYMENT PLAN FOR THE BASE YEAR						
Year	2020	This section records the actual teacher period allocations and brief curriculum descriptions of the actual timetable in use in the base year.				
Timetable cycle length in periods						
	tp	Average Class Size	FTE Teachers employed	NOTES		
National Curriculum Year	tp	Allocation				
Year 7	270	n/a	RDV/DT			
Year 8	270	n/a	RDV/DT			
Year 9	270	n/a	RDV/DT			
Year 10	270	n/a	RDV/DT			
Year 11	190	n/a	RDV/DT			
Year 12	0	n/a	RDV/DT			
Year 13	0	n/a	RDV/DT			
Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)						
Learning Support	n/a	n/a	RDV/DT			
Intervention activity	n/a	n/a	RDV/DT			
Other teacher contact time	n/a	n/a	RDV/DT			
			Overall totals			
	tp	Allocation				
Totals	1270	0				
TEACHER IMPLICATIONS						
Average Class Size (PFR to the curriculum)	RDV/DT		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 is shown to two places of decimals. The value for contact ratio should be used to inform the view of the value to be used on sheets for future years. The contact ratio is shown to three places of decimals on the deployment sheets to give a reasonable level of accuracy.			
Contact Ratio	RDV/DT					
Average teaching load	0.0					
FTE TEACHERS EMPLOYED	58.00		This value copies from the Summary sheet.			
The following data is shown for users who wish to reference their 11 to 16 curriculum to the BASIC/BONUS model of T.A.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.						
Calculation excluding whole school tp						
Total tp allocated in years 7 to 11		0				
BASIC reference level of Teacher Periods for Average Class Size ~27		0.0				
BONUS number of teacher periods		0.0				
Relative Curriculum Bonus (BONUS as % of BASIC)		RDV/DT				
Calculation including whole school tp						
Total tp allocated in years 7 to 11		0				
BASIC reference level of Teacher Periods for Average Class Size ~27		0.0				
BONUS number of teacher periods		0.0				
Relative Curriculum Bonus (BONUS as % of BASIC)		RDV/DT				



ICFP Tools – Teacher Deployment

TEACHER DEPLOYMENT PLAN FOR THE BASE YEAR					
Year	2020	This section records the actual teacher period allocations and brief curriculum descriptions of the actual timetable in use in the base year.			
Timetable cycle length in periods	25				
National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers employed	NOTES
Year 7	270	250	27.00	11.69	
Year 8	273	250	27.30	11.69	
Year 9	275	250	27.50	11.69	
Year 10	270	250	27.00	11.69	
Year 11	190	200	23.75	9.35	
Year 12	0	n/a		0.00	
Year 13	0	n/a		0.00	
Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
Learning Support	n/a	20	n/a	0.94	e.g. for support work with extracted pupils
Intervention activity	n/a	10	n/a	0.47	e.g. for targeted 1:1 work and team teaching
Other teacher contact time	n/a	10	n/a	0.47	e.g. initially unallocated for timetable flexibility but eventually for use in intervention
Overall totals					
		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 is shown to two places of decimals. The value for contact ratio should be used to inform the view of the value to be used on sheets for future years. The contact ratio is shown to three places of decimals on the deployment sheets to give a reasonable level of accuracy	
Totals		1278	1240		
TEACHING REPLICATIONS					
Average Class Size (PTR in Curriculum)		25.77			
Contact Ratio		0.855			
Average teaching load		21.4			

ICFP Tools – Teacher Deployment

Overall totals		
	Roll	tp Allocation
Totals	1278	1240
TEACHER IMPLICATIONS 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 is shown to two places of decimals. The value for contact ratio should be used to inform the view of the value to be used on sheets for future years. The contact ratio is shown to three places of decimals on the deployment sheets to give a reasonable level of accuracy		
Average Class Size (PTR in the curriculum)		25.77
Contact Ratio		0.855
Average teaching load		21.4
FTE TEACHERS EMPLOYED	58.00	This value copies from the Summary sheet.

[illegible]

ICFP Tools – Teacher Deployment

TEACHER DEPLOYMENT PLAN FOR THE PLANNED YEAR					
Year	2021	This section records the intended teacher period allocations and brief curriculum descriptions for timetable planning in the year following the			
Timetable cycle length in periods	25	BASE YEAR called the PLANNED YEAR.			
National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers required	NOTES
Year 7	257	250	25.70	12.82	
Year 8	270	250	27.00	12.82	
Year 9	273	250	27.30	12.82	
Year 10	275	250	27.50	12.82	
Year 11	270	250	27.00	12.82	
Year 12	0	n/a		0.00	
Year 13	0	n/a		0.00	
Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
Learning Support	n/a	20	n/a	1.03	
Intervention activity	n/a	10	n/a	0.51	
Other teacher contact time	n/a	10	n/a	0.51	
Overall totals					
	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.		
	1345	1290			
TEACHER IMPLICATIONS					
Average Class Size (PTR in the curriculum)		26.07			
Contact Ratio		0.78			
Average teaching load		19.5	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		
FTE TEACHERS REQUIRED BY THIS DEPLOYMENT		66.20			
FTE TEACHERS EMPLOYED	60.00				

ICFP Tools – Teacher Deployment




			Overall totals	
	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.	
Totals	1345	1290		
TEACHER IMPLICATIONS				
Average Class Size (PTR in the curriculum)		26.07		
Contact Ratio		0.8		
Average teaching load		20.0		
FTE TEACHERS REQUIRED BY THIS DEPLOYMENT			64.50	
FTE TEACHERS EMPLOYED	60.00		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	

			Overall totals	
	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.	
Totals	1345	1290		
TEACHER IMPLICATIONS				
Average Class Size (PTR in the curriculum)		26.07		
Contact Ratio		0.86		
Average teaching load		21.5		
FTE TEACHERS REQUIRED BY THIS DEPLOYMENT			60.00	
FTE TEACHERS EMPLOYED	60.00		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	

[illegible]

ICFP Tools – Teacher Deployment



Year:	2022	This section records the intended teacher period allocations and brief curriculum descriptions for timetable planning in the year following the PLANNED			
Timetable cycle length in periods	25	YEAR called the PROJECTED YEAR.			
National Curriculum Year	Pupil Roll	tp Allocation	Average Class Size	FTE teachers required	NOTES
Year 7	270	250	27.00	12.82	
Year 8	257	250	25.70	12.82	
Year 9	270	250	27.00	12.82	
Year 10	273	250	27.30	12.82	
Year 11	275	250	27.50	12.82	
Year 12	0		n/a	0.00	
Year 13	0		n/a	0.00	
Whole School Areas (i.e. all other teacher contact time not allocated in year group sections above)					
Learning Support	n/a	20	n/a	1.03	
Intervention activity	n/a	10	n/a	0.51	
Other teacher contact time	n/a	10	n/a	0.51	
Overall totals					
	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.		
Totals	1345	1290			
TEACHER IMPLICATIONS					
Average Class Size (PTR in the curriculum)		26.07			
Contact ratio		0.780			
Average teaching load		19.5	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		
FTE TEACHERS REQUIRED BY THIS DEPLOYMENT		66.2			
FTE TEACHERS EMPLOYED	63.00				

ICFP Tools – Teacher Deployment



SUMMARY STATISTICS (Example potential KPI and benchmark values)			
Per Pupil Revenue (in Year)	£4,891	£4,891	£4,891
Average Teacher Cost	£49,138	£49,138	£49,138
In year balance as a percentage of in year revenue	0.22	0.22	0.22
Cumulative balance as a percentage of the in year revenue	0.22	0.44	0.67
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
Teacher contact ratio	0.78	0.78	0.78
Average Class Size for PTR and Contact ratio on previous two lines	20.43	20.41	20.41
Average Class Size on DEPLOYMENT SHEETS (see comment attached to cell)	20.43	20.43	20.43
Proportion of in year revenue spent on teaching staff	63%	63%	63%
Proportion of in year revenue available for teaching in a balanced budget if all other costs are fixed	63.6%	63.6%	63.6%
Proportion in a balanced budget based on in year revenue	15.8	15.8	15.8
AFFORDABLE FTE TEACHERS in a balanced budget (Shown to 1 decimal place)	58.2	58.2	58.2
FTE TEACHERS EMPLOYED	58.0	58.0	58.0
Teachers employed to Ed support staff ratio	4.1	4.1	4.1
All staff to admin staff ratio	8.6	8.6	8.6
Pupil to Ed support staff ratio	65.7	65.7	65.7
Pupil to adult ratio	10.7	10.7	10.7
Proportion of revenue spent on staff costs	78.9%	78.9%	78.9%
Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	15.3%	15.3%	15.3%
Curriculum BONUS as a percentage of BASIC for 11 to 16 section of curriculum only (Relative Curriculum Bonus)	8.9%	8.9%	8.9%

ICFP Tools – Other Tabs



WHAT IS CONTACT RATIO sheet

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



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.

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WHAT IS AVERAGE CLASS SIZE sheet

This sheet provides a stepwise explanation of Average Class Size and illustrates the difference between that and Average Teaching Group size.

BONUS AND BASIC sheet

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



Bonus and Basic




Using BONUS AND BASIC to describe an existing curriculum										
FTE Teachers		43								
Periods in the timetable cycle		25								
Total teacher periods allocated		822								
Average teacher load		19.12								
Teacher contact ratio		0.765								
Year Group	Roll	Actual tp allocation	BASIC tp	BONUS tp	Relative Bonus	Notes describing curriculum structure				Average class size
Year 7	150	133	138.9	-5.9	-4.2%	5 classes for 21 periods, 6 Pp groups for 2 periods, 8 Tk groups for 2 periods				28.2
Year 8	160	154	148.1	5.9	4.0%	6 classes for 23 periods 8 Tk groups for 2 periods				26.0
Year 9	170	158	157.4	0.6	0.4%	6 classes for 23 periods 10 Tk groups for 2 periods				26.9
Year 10	165	184	152.8	31.2	20.4%	7 classes for 16 periods 3 option blocks, 3 periods each 8 subjects per block				22.4
Year 11	180	193	166.7	26.3	15.8%	7 classes for 16 periods 3 option blocks, 3 periods each 9 subjects per block				23.3
Total	825	822	763.9	58.1	7.6%					25.1

Curriculum impact for the PLANNED academic year based on different numbers of Teachers				
	With IN YEAR FTE	With CUMULATIVE FTE	With FINANCE	User input FTE (Text Value)
FTE Teachers	58.3	60.1	61.0	58.0
PTR	23.07	22.37	22.05	23.19
Average class size for target teacher contact ratio	25.92	25.34	24.77	26.08
Teacher period budget (tp) at target teacher contact ratio	1297	1337	1357	1290
Relative bonus (ONLY APPLICABLE IF THE SCHOOL IS AN 11 to 16 SCHOOL) SEE NOTE LINKED TO CELL	4.2%	7.4%	9.0%	3.6%

[illegible]

Bonus and Basic




Using BONUS AND BASIC to describe an existing curriculum										
FTE Teachers		43								
Periods in the timetable cycle		25								
Total teacher periods allocated		822								
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Teacher contact ratio		0.765								
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Year 10	165	184	152.8	31.2	20.4%	7 classes for 16 periods 3 option blocks, 3 periods each 8 subjects per block				22.4
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Total	825	822	763.9	58.1	7.6%					25.1

Curriculum impact for the PLANNED academic year based on different numbers of Teachers				
	With IN YEAR FTE	With CUMULATIVE FTE	With FINANCE	User input FTE (Text Value)
FTE Teachers	58.3	60.1	61.0	58.0
PTR	23.07	22.37	22.65	23.19
Average class size for target teacher contact ratio	25.92	25.34	24.77	26.08
Teacher period budget (tp) at target teacher contact ratio	1297	1337	1357	1290
Relative bonus (ONLY APPLICABLE IF THE SCHOOL IS AN 11 to 16 SCHOOL) SEE NOTE LINKED TO CELL	4.2%	7.4%	9.0%	3.6%

[illegible]

ICFP Tools – Other Tabs



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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.

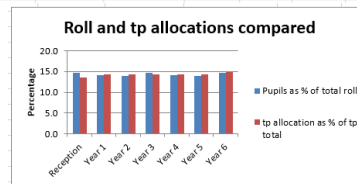
Revenue Cost of one teaching period

Total
Revenue

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Total
Teaching
Periods

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



Pioneer Academy Trust Tool

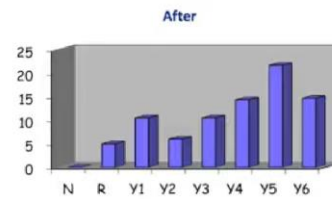
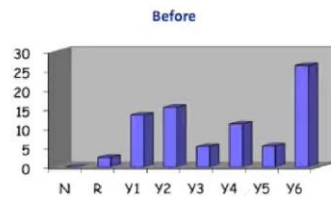
They call it Staff Deployment Analysis Tool



Staff Deployment Analysis

Curriculum bonus definition:

The curriculum bonus is any additional hours taught to pupils, above and beyond the core 25 hours of teaching time per week.



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Pioneer Academy Trust Tool

They call it Staff Deployment Analysis Tool

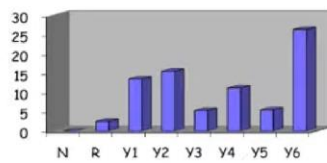


Staff Deployment Analysis

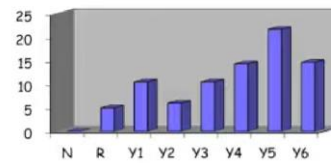
Curriculum bonus definition:

The curriculum bonus is any additional hours taught to pupils, above and beyond the core 25 hours of teaching time per week.

Before



After



Slide 60