

14-19 FINANCIAL GUIDELINES

Briefing Notes

This document is not designed to be a free standing unit, but stands together with the Service and Partnership Agreements. Detailed protocols covering all the areas of concern and linked to the Financial Guidelines, Partnership Agreement and Service Agreement are designed to support these main documents and should be consulted whenever collaborative provision is being organised.

The following Financial Guidelines set out a pricing structure based upon the LSC (Learning and Skills Council) and AWPU (Age Weighted Pupil Units) funding received by institutions and directly related to the actual costs of providing courses across the whole range of qualifications, both 14-16 and 16-19.

It is intended that the Financial Guidelines are fair, equitable and user friendly. The Financial Guidelines are therefore recommended as the base line for buying and selling provision in the 14 – 19 sector.

It is appreciated that some provision is more expensive because smaller numbers need to be accommodated e. g. groups with SEN or needing specialist equipment/accommodation. In this case the guidelines should form the starting point for negotiations. It must be borne in mind that for some provision providers can draw down funds from elsewhere to supplement funds from the Learning Base. Such funding would be additional to the figures in these guidelines.

This section contains:

- Guidance on unit costs and cost weightings
- Financial agreement forms to be completed by all parties
- A summary responsibility sheet for schools

Notice of student placement cancellation can be found as **Appendix 1a**.

It should be noted that these guidelines are designed to help collaborative working and not to act as a barrier to student choice. Whilst in some circumstances it may be appropriate for collaborating institutions to use charges, which differ from the guidelines, wild variations from the guidelines may result in a situation where there are financial winners and losers. This should be borne in mind at the outset.

Please make sure you complete the forms appropriate to your Learning Base and Learning Provider circumstances.

Cost Weightings

All AS/A2 Levels, GCSEs and short-course GCSEs are weighted A except for the subjects below which are weighted B.

Agricultural Science	Applied Physics	Archaeology
Art & Design	Astronomy	Biology
Botany	Building Studies	Catering
Chemistry	Communications Studies	Computer Science
Craft and Design	Dance	Design and Technology
Drama	Earth Science	Electronics
Engineering	Engineering Technology	Environmental Science
Fashion & Textiles	Film Studies	Geography
Geology	Graphical Communication	Home Economics
Human Biology	Information Studies	Information Technology
Land Surveying	Marine Navigation	Media Studies
Meteorology	Motor Vehicle	Music
Performing Arts	Photography	Physics
Psychology	Science	Social Biology
Textiles	Theatre Studies	Zoology

All Vocational programmes (i.e. NVQ, BTEC) are weighted A except those subjects listed below which are weighted B or C

Subjects weighted B

Childcare/Early Years
Health and Social Care
Information and Communication Technology
Information Technology
Media: Communication and Production
Music
Performing Arts
Performing Arts and Entertainment Industries
Science
Sports Studies

Subjects weighted C

Art and Design
Built Environment
Construction and the Built Environment
Engineering
Fashion textiles
Hairdressing
Horticulture
Hospitality and Catering
Land and Environment
Manufacturing
Photography
Therapeutic personal care
Vehicle Maintenance

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Guidance Notes for Wolverhampton Schools and LEA Departments

PART A: When a School (or LEA Department) is the Learning Provider

If you are a school providing training to students who are on roll at another school, the form that follows has been devised for you to use as a written financial agreement between yourself (the Learning Provider) and the School with whom you have a Service Agreement (the Learning Base). A separate form should be used for each course and each school.

It is intended that this form be used in conjunction with the Wolverhampton 14-19 Pathfinder Fee Structure (Post 16 courses, Pre 16 Courses and B-Tec Courses). The fee structure sets out suggested 'fair rates', which can be adopted by schools for providing programmes of learning.

Please complete all details in Part A. The income ledger code has been created by the Finance Department as a unique ledger code for this purpose and schools will already have received instructions on how to link this to their chosen Fund/Cost Centre code.

On completion of Part A, the form should be forwarded to the Learning Base, for them to complete Part B. The Learning Base will then return this to you. Please forward a copy of the completed form to the Central Office, Jennie Lee Centre for the necessary journal transfers to be carried out.

PART B: Learning Base

If you are a school sending students to another school for part of their training, you will receive this form from the school providing training (learning provider) and need to **complete Part B** to confirm your agreement to the charges, and to instruct the Central Office, Jennie Lee Centre to carry out journal transfers on your behalf. The Expenditure Ledger Code has been created by the Finance Department as a unique ledger code for this purpose and schools will already have received instructions on how to link this to their chosen Fund/Cost Centre code.

On completion of Part B, please retain a copy for your records, and return the original to the Learning Provider.

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Wolverhampton Schools and LEA departments

This form must be completed in two parts.

PART A TO BE COMPLETED BY THE LEARNING PROVIDER

_____ School, (being the Learning Provider)
agree to deliver _____ (the Programme)
to students on roll at _____ School (Learning Base)

Pre 16 / Post 16 (please indicate) Type of qualification (e.g. GCSE) _____

Weighting (where applicable) Number of units (where applicable)

Course fee per student (A) £ (as per the W'ton 14-19 Fee structure)

Number of students (B)

Total cost for all students is (A x B) £

Income Ledger Code (Cost Centre and Fund Code to be determined by School)

Signed (Head teacher/bursar) Date.....

PART B TO BE COMPLETED BY THE LEARNING BASE

_____ School (Learning Base)

agree to pay the Total cost of £ and instruct the LEA to carry out journal transfers on specified payment dates in accordance with the Service Agreement. Please debit the following code.

Ledger Code (Cost Centre and Fund Code to be determined by School)

Signed.....(Head teacher) Date

LEARNING BASE – On completion, retain a copy and return this form to the Learning Provider
LEARNING PROVIDER – On receipt of the completed form please send to Central Office Jennie Lee Centre for the necessary journal transfers to be carried out.



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Guidance Notes for Learning Providers/Training Providers/Employers and the Learning Base

PART A: Learning Provider/Training Provider/Employer

If you are a learning provider or employer, the form that follows has been devised for you to use as a written agreement between yourself (the Learning Provider) and the School with whom you have a Service Agreement (the Learning Base). A separate form should be used for each course and each school.

You are not obliged to use this form, if you have a similar company form, which you currently use.

When completing this form, please state the course fee per student, and if your rate is per session, state the total number of sessions. Please show the total number of students to whom the form relates.

Where possible, please indicate the type of qualification/ the weighting / the number of units. The programme weighting takes into account that some programmes of similar length or leading to an equivalent qualification are more costly than others to deliver, and hence are given a weighting A, B or C (as per LSC Sixth Form funding rates)

The number of units relates to GNVQ/AVCE/GCSE/B-TEC where the programme can be completed in different numbers of units.

If the above accreditations are not applicable, please ignore this section.

Payment Terms – Please indicate how payment will be collected (e.g. invoice, together with payment dates and frequency) to enable budget planning.

The form must now be forwarded to the Learning Base, so that they can complete Part B. On completion they should retain a copy and return the original copy to you.

PART B: Learning Base

This form has been designed for use by Learning Providers/Training Providers/Employers, to notify you of the charges relating to a programme of training as set out in the Service Agreement.

Please complete Part B to confirm your agreement to the charges and payment terms, and retain a copy in school for record purposes. The original should be returned to the learning provider.

14-19 FINANCE AGREEMENT 2005-06

Learning Providers/Training Providers/Employers

This form must be completed in two parts.

PART A TO BE COMPLETED BY THE LEARNING PROVIDER

_____ (being the Learning Provider)
agree to deliver _____ (the Programme)
to students on roll at _____ School (the Learning Base)

* Pre 16 / Post 16 (* please indicate) Type of qualification/accreditation _____

Weighting (where applicable) Number of units (where applicable)

Course fee per student ** £ ** if per session, please indicate how many sessions in total

Total cost per student (A) £ No. of students (B)

Total cost for all students is (A x B) £

Payment Terms: (please complete) _____

Signed Position Date.....

PART B TO BE COMPLETED BY THE LEARNING BASE

_____ School (Learning Base)

agree to pay the Total cost of £ in accordance with the Payment Terms specified above.

Signed..... (Head teacher) Date

LEARNING BASE – On completion, please retain a copy of this form and return the original to the Learning Provider



Journal Transfer Dates for 2005-2006 Academic Year

For use when the School is a Learning Provider (not for use by Training Providers or Employers)

Journal transfers will be done centrally on specified dates in the academic year: -

Dates:

Autumn Term	40%	week commencing Monday 7 th November 2005
Spring Term	30%	week commencing Monday 20 th February 2006
Summer Term	30%	week commencing Monday 5 th June 2006

Learning Providers Responsibility:-

- To complete Part A of the Finance Agreement for all students on roll on the programme on **Friday 21st October 2005** (end of first Half term) and to forward the Agreement to the Student Base for completion of Part B.
- To submit completed Finance agreements to the central office, Jennie Lee Centre on or before Friday 4th November 2005 to ensure that the 1st journal transfer (Autumn Term) can be carried out. For late starters, the Finance Agreement should be submitted as soon as both parties have completed it.
- To inform the Learning Base of a withdrawal/cancellation, in writing using the official cancellation form (subsequent to discussion with the Learning Base).

Learning Base Responsibility: -

- To complete Part B of the Finance Agreement and return to the Learning Provider by Wednesday 2nd November 2005.
- To inform the Learning Provider of all withdrawals/cancellations, in writing using the official cancellation form *Central Office Team Responsibility:-*
- To collate all completed Financial Agreements, after Friday 4th November 2005, and carry out journal transfers (as agreed with Finance Department) on the dates above.

Notice of Student Placement Cancellation

(to be used only after consultation between Learning Base and Learning Provider)

To _____ **Learning Base/Learning Provider ***

From _____ **Learning Base/Learning Provider ***

Course/Training Programme _____

Name of Student _____

Please note the above student has withdrawn from the course with effect from _____

Reason _____

Signed _____ Position _____ Date _____

1 Copy to each of:-

- **Learning Base / Learning Provider ***
- **Central Office Jennie Lee Centre (for termly charges to be adjusted)**

* **Please delete as appropriate**

