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SCHEDULE 2

Regulation 4(3)

PART 2 OF A BUDGET STATEMENT

Part 2 of a budget statement (information about the allocation formula) must be in the following form and in accordance with the notes. Both the English and Welsh versions of the form must be completed.

SS2 EDUCATION BUDGET STATEMENT		Table 2: Funding Factors	
YEAR	LEA	Table version N ^o	LEA N ^o Completion Date

INDIVIDUAL SCHOOLS BUDGET - FUNDING FACTORS (1)

PRIMARY AND SECONDARY SCHOOLS (2)

Pupil Count Arrangements (3)

Narrative to include:- Method of pupil count and count dates
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Type and factor name (4)

Range Or Level (5)	Unit Value (6) £	Pupil/ place Numbers (7)	Funds Allocated (8) £	% of Primary & Secondary budgets (9)
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Pupil- led funding (10)
AGE-WEIGHTED FUNDING (11)
e.g. Age/Year/Key Stage

Weighting
Ratios (12)

1					
2					
3					

Nursery Education - place-led

Sixth Form Subject

(13) Method

(14)	Primary		
	Secondary		
	Total		

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Type and factor name	Range or Level	Unit Value £	Pupil/place Numbers	Funds Allocated £	% of Primary & Secondary budgets
SEN - PUPILS WITH STATEMENTS (15) Where more than one method is used to allocate funding, a full explanation of the methodology must be shown for each.	<i>Band 1 Band 2 etc.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>Method</i>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Primary	<input type="text"/>	<input type="text"/>	
		Secondary	<input type="text"/>	<input type="text"/>	
		Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
SEN - PUPILS WITHOUT STATEMENTS (16) Only the first 5% of this funding as a proportion of the primary and secondary school budgets may be counted towards the "pupil-led" percentage target. Any remainder should be entered at (20) below.		<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>Method</i>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Primary	<input type="text"/>	<input type="text"/>	
		Secondary	<input type="text"/>	<input type="text"/>	
		Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
SEN - PLACE-LED FUNDING TREATED AS PUPIL-LED (17)	<i>Band 1 Band 2 Etc.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>Method</i>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Primary	<input type="text"/>	<input type="text"/>	
		Secondary	<input type="text"/>	<input type="text"/>	
		Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
23					
OTHER PUPIL-LED FACTORS (18)		<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>Method</i>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Primary	<input type="text"/>	<input type="text"/>	
		Secondary	<input type="text"/>	<input type="text"/>	
		Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL OF FUNDING TREATED AS PUPIL-LED (19)		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Primary	<input type="text"/>	<input type="text"/>	
		Secondary	<input type="text"/>	<input type="text"/>	
		Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
EXCESS SEN FUNDING - PUPILS WITHOUT STATEMENTS (20) Any funding in addition to the limited funding at (16) above.		<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>Method</i>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Primary	<input type="text"/>	<input type="text"/>	
		Secondary	<input type="text"/>	<input type="text"/>	
		Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Funding (21)		<input type="text"/>	<input type="text"/>	<input type="text"/>	
ADDITIONAL EDUCATIONAL NEEDS FACTOR (22)	<i>X% Y% Z%</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>Method</i>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Primary	<input type="text"/>	<input type="text"/>	
		Secondary	<input type="text"/>	<input type="text"/>	
		Total	<input type="text"/>	<input type="text"/>	<input type="text"/>

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Type and factor name	Range or Level	Unit Value £	Multiplier (24)	Funds Allocated £
SITE SPECIFIC FACTORS (23)				
<i>Method</i>				
		Primary		
		Secondary		
		Total		
SCHOOL SPECIFIC FACTORS (25)				
<i>Method</i>				
		Primary		
		Secondary		
		Total		
BUDGET ADJUSTMENTS (26) <i>e.g. prior year adjustments</i>				
<i>Method</i>				
		Primary		
		Secondary		
		Total		
UNALLOCATED RESERVE (27)				
		Primary		
		Secondary		
		Total		
TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (28)				
		Primary		
		Secondary		
		Total		
				100%

25

SPECIAL SCHOOLS (29) TYPE AND FACTOR NAME	Range or Level	Unit Value £	Place/ Pupil Numbers	Funds Allocated £
Place-led funding (30)				
<i>Method</i>				
Pupil-led funding (31)				
<i>Method</i>				
Other factors (32)				
ADDITIONAL EDUCATIONAL NEEDS FACTOR (33)				
<i>Method</i>				

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Type and factor name	Range or Level	Unit Value £	Place/ Pupil Numbers	Funds Allocated £
SITE SPECIFIC FACTORS (34)				
Method				
SCHOOL SPECIFIC FACTORS (35)				
Method				
BUDGET ADJUSTMENTS (36) <i>Prior year adjustments</i>				
Method				
UNALLOCATED RESERVE (37)				
TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (38)				
TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (39)				

ANNEX

Supplementary information

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NOTES TO PART 2

INDIVIDUAL SCHOOLS BUDGET — FUNDING FACTORS

1. The numbered notes below refer to the items in the table bearing the corresponding number. Where an authority do not intend to make any financial provision for any matter listed in the table a zero must be entered at the appropriate place.

The table must list and include a description of each factor used including the full methodology of the factor. This description should be provided in the table in the relevant box headed “Method”.

PRIMARY AND SECONDARY SCHOOLS

2

3. Enter here a description of the method used to calculate from the pupil numbers taken from the annual school census, the number of pupils to be taken into account in allocating funding through the authority’s allocation formula.

4. A general column heading for the type and factor name used to determine school budgets.

5. Enter in this column (5) opposite each factor in column (4) and in ascending order each relevant year, age group, year group, subject taught or band based on assessment of need applicable in accordance with the allocation formula for primary and secondary schools, specifying separately any specific separate categories for pupils in nursery classes or for those funded according to the subject being studied. Where the number of pupils in nursery classes is weighted then the weightings must be shown and a note provided to explain whether numbers are the actual numbers or based on full-time equivalents. Enter also at the appropriate sections of the table the range or levels relating to site specific and school specific factors.

6. Enter in this column (6), opposite each entry in column (4), the amount attributed to each pupil in that year, age group, year group, subject taught or band based on assessment of need.

7. Enter in this column (7) opposite each entry in column (4)—

(a) the total number of registered pupils in that year, age group or year group at primary and secondary schools taken into account in the allocation formula but ignoring any weighting; or

(b) the number of places, in the case of provision of places in schools which the authority recognise as reserved for children with special educational needs, or for children in nursery classes.

8. Enter in this column (8), opposite each entry in column (4), the amounts produced by multiplying the amount in column (6) by the number in column (7).

9. Enter in this column (9) the aggregate of the amounts in column (8) expressed as a percentage of the amount referred to in line (32).

10. A sub-heading for the factors which allocate the ISB by reference to the numbers of registered pupils at primary and secondary schools and their ages (or age group or year group to which they belong), their attendance at a nursery class, their subjects of study or any special educational needs they may have or are to be treated as having for the purposes of the application of the allocation formula, so that each pupil within a given category attracts equal amounts regardless of the school which he or she attends.

11. A heading for the entries to be made under the age-weighted funding subsection of the table.

12. Enter in this column (12) the amounts which represent the weighting given according to age (including key stage or year group), whether a pupil is provided with nursery education or the subject or course of study in the case of pupils in a sixth form.

13. Enter here a description of the method used to operate the factor, explaining variations in level of provision which pupils or their schools may attract.

14. Enter here the aggregate of the numbers in column (7), and the aggregate of the amounts in column (8), separately for primary schools, secondary schools and give a total.

Pupil-led SEN funding

15. Enter in this column each factor, relating to pupils with statements, which allocates the ISB by reference to the numbers of registered pupils at primary and secondary schools and any special educational needs they may have or are to be treated as having for the purposes of applying the allocation formula.

16. Enter in this column each factor relating to pupils without statements, which would fall to be entered in column (15) if it related to pupils with statements.

Place-led SEN funding treated as pupil-led

17. Enter in this column each factor (other than those referred to in notes (10) to (16) above) which allocates the ISB on the basis of the relative needs of individual primary and secondary schools to incur expenditure in making special educational provision for places for pupils with special educational needs.

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Other funding treated as pupil-led

18. Enter in this column (18) each factor (other than those referred to in notes (10) to (17) above) in accordance with which the same funding is allocated for pupils of the same age irrespective of the nature of the school which they attend.

Total primary and secondary funds treated as pupil-led

19. Enter here the aggregate of the amounts entered in the total boxes in lines (11), (15), (16), (17) and (18), in accordance with note (14) separately for primary schools, secondary schools and in total and the aggregate of the percentages entered in column (9).

Excess SEN funding for pupils without statements

20. Enter in this column each factor relating to pupils without statements of special educational needs which would fall to be entered in column (16) above but for the limiting effect of regulation 22(d) of the 1999 Regulations.

OTHER FUNDING

21. A sub-heading for the factors which allocate the ISB by reference to factors other than those referred to in notes (11) to (18). All factors in this section must be allocated to one of the following groups:

Additional educational needs,
site specific, or
school specific.

Additional educational needs factor

22. Enter in this column (22) each factor in accordance with which amounts are allocated to primary and secondary schools for additional educational needs.

Site specific factors

23. Enter in this column (23) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to a school's buildings or grounds.

24. Enter in this column (24), opposite each unit of measurement described in columns (23), (25) and (26), the number of units in question.

School specific factors

25. Enter in this column (25) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to a school's characteristics.

Budget adjustments

26. Enter in this column (26) each factor in accordance with which amounts are allocated to primary and secondary schools pursuant to any provisions of the the 1999 Regulations dealing with budget adjustments. Include any adjustments to reflect retrospective pupil number adjustments including excluded pupils.

Unallocated reserve

27. Enter here the amount of that part of the authority's ISB retained in respect of primary and secondary schools and not allocated at the beginning of the financial year. Show the amounts separately for primary schools, secondary schools and give a total.

TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS

28. Enter here the aggregate of the amounts entered in accordance with notes (19), (20), (22), (23), (25), (26) and (27), separately for primary schools, secondary schools and in total.

SPECIAL SCHOOLS

29. A general heading for the schools to which this section of the table relates.

Place-led funding

30. Enter in this column (30) the type of factor and factor name used to allocate the ISB to special schools by reference to the numbers and kinds of places they provide.

Pupil-led funding

31. Enter in this column (31) each factor in accordance with which amounts are allocated to special schools by reference to the numbers and kinds of pupils at the school.

Other factors

32. A sub-heading for the factors which allocate the ISB to special schools otherwise than by reference to the number of places provided, or registered pupils at such schools. All factors in this section must be allocated to one of the following groups:

Additional educational needs,
site specific, or
school specific.

Additional educational needs factors

33. Enter in this column (33) each factor in accordance with which amounts are allocated for additional educational needs.

Site specific factors

34. Enter in this column (34) each factor in accordance with which amounts are allocated by reference to a special school's buildings or grounds.

School specific factors

35. Enter in this column (35) each factor in accordance with which amounts are allocated by reference to a school's characteristics.

Budget adjustments

36. Enter in this column (36) each factor in accordance with which amounts are allocated to special schools pursuant to any provisions of the 1999 Regulations dealing with budget adjustments.

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Unallocated reserve

37. Enter here the amount of that part of the authority's ISB retained in respect of special schools and not allocated at the beginning of the financial year.

Total funds allocated to special schools

38. Enter here the aggregate of the amounts entered in accordance with notes (30), (31), (33), (34), (35), (36) and (37).

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (ISB)

39. Enter here the aggregate of the amounts entered in accordance with notes (28) and (38).

ANNEX TO PART 2

An authority may include in the Annex any relevant information in addition to that required to be included in the table.