
STATUTORY INSTRUMENTS

2000 No. 576

EDUCATION, ENGLAND

The Education (Budget Statements) (England) Regulations 2000

<i>Made</i>	- - - -	<i>4th March 2000</i>
<i>Laid before Parliament</i>		<i>6th March 2000</i>
<i>Coming into force</i>	- -	<i>6th March 2000</i>

In exercise of the powers conferred on the Secretary of State by sections 52(1), (3) and (4) and 138(7) of the School Standards and Framework Act 1998(1), the Secretary of State for Education and Employment hereby makes the following Regulations:

Citation, commencement and application

1.—(1) These Regulations may be cited as the Education (Budget Statements) (England) Regulations 2000 and shall come into force on 6th March 2000.

(2) These Regulations shall apply only in relation to England and, except for regulation 3, only in relation to budget statements prepared for the financial year beginning on 1st April 2000.

Interpretation

2.—(1) In these Regulations—

“the 1996 Act” means the Education Act 1996(2);

“the 1998 Act” means the School Standards and Framework Act 1998;

“the 1999 Budget Statements Regulations” means the Education (Budget Statements and Supplementary Provisions) Regulations 1999(3);

“the 2000 Regulations” means the Financing of Maintained Schools (England) Regulations 2000(4);

“allocation formula” means the authority’s formula under regulation 10 of the 2000 Regulations used to determine schools' budget shares;

“authority” means a local education authority;

(1) 1998 c. 31. By virtue of the National Assembly for Wales (Transfer of Functions) Order 1999 (S.I.1999/672) the powers conferred by these provisions are exercisable by the Secretary of State only in relation to England. For the meaning of “prescribed” and “regulations” see section 142(1).

(2) 1996 c. 56.

(3) S.I. 1999/486.

(4) S.I. 2000/478.

- “budget statement” means the statement referred to in section 52(1) of the 1998 Act;
- “DfEE number” means the reference number allocated to a school by the Department for Education and Employment;
- “factor” means one of the factors or criteria taken into account in the allocation formula;
- “ISB” means an authority’s individual schools budget within the meaning of section 46(2) of the 1998 Act;
- “LEA number” means the reference number allocated to an authority by the Department for Education and Employment;
- “LSB” means an authority’s local schools budget within the meaning of section 46(1) of the 1998 Act;
- “maintained school” means a community, foundation or voluntary school or a community or foundation special school;
- “relevant” in relation to “age”, “age group” and “year group” means an age, age group or year group separately treated in the allocation formula for the purposes of determining that part of each school’s budget share which is to be determined by reference to numbers of registered pupils;
- “school” means a maintained school;
- “special educational needs” and “special educational provision ” have the meanings given to those expressions by section 312 of the 1996 Act;
- “Standards Fund grant” means grant paid under section 484 of the 1996 Act together with the authority’s expenditure not offset by that grant but taken into account in determining the amount of that grant;
- “statement” in relation to a pupil with special educational needs means a statement made under section 324 of the 1996 Act; and
- “version number” means a number which distinguishes a particular form submitted by the authority from earlier versions of that form prepared by them.

(2) In these Regulations, unless the context otherwise requires,—

- (a) references to primary or secondary schools do not include special schools; and
- (b) references to the number or numbers of registered pupils at one or more schools are references to the number or numbers of such pupils required under the allocation formula to be used for the initial determination of that school’s budget share or those schools’ budget shares for the year but ignoring any weighting in accordance with paragraph (8) or any adjustment under paragraph (9) of regulation 11 of the 2000 Regulations.

(3) The following table shows provisions of the 1996 Act or the 1998 Act defining or otherwise explaining expressions used in these Regulations—

financial year	section 579(1) of the 1996 Act
scheme	section 48(1) of the 1998 Act
school’s budget share	section 47(1) of the 1998 Act.

(4) Any reference in these Regulations to a numbered regulation or Schedule is a reference to the regulation or Schedule in these Regulations so numbered.

Amendment of the 1999 Budget Statements Regulations

3. Regulations 4 to 8 of, and the Schedules to, the 1999 Budget Statements Regulations shall apply only in relation to budget statements relating to the financial year beginning on 1st April 1999.

Prescribed form of, and information to be contained in, budget statements

4.—(1) A budget statement shall be prepared in four parts, and shall contain the information prescribed for the purposes of section 52(1) of the 1998 Act, as follows—

- (a) Part 1 shall be in the form prescribed in Schedule 1 and shall contain the information, relating to the authority's planned expenditure for the financial year to which the budget statement relates, specified in the notes to Part 1 in Schedule 1;
- (b) Part 2 shall be in the form prescribed in Schedule 2 and shall contain the information, with respect to the authority's planned expenditure for each school for the financial year to which the budget statement relates, specified in the notes to Part 2 in Schedule 2;
- (c) Part 3 shall be in the form prescribed in Schedule 3 and shall contain the information with respect to the authority's allocation formula specified in the notes to Part 3 in Schedule 3; and
- (d) Part 4 shall contain the information with respect to the budget share of each school for the financial year to which the budget statement relates specified in Schedule 4.

(2) The following information must appear at the top of each of Parts 1 to 4 of a budget statement—

- (a) the financial year to which the budget statement relates;
- (b) the authority's name;
- (c) the authority's LEA number;
- (d) the authority's E-mail address;
- (e) the name of a person who can deal with queries in relation to the completed form;
- (f) that person's telephone number;
- (g) the version number; and
- (h) the date that the form was completed.

(3) Where a person is carrying out functions on behalf of an authority then the authority shall include information in Parts 1 to 4 of the budget statement as if expenditure by that person in carrying out those functions were expenditure by the authority.

Prescribed manner and time of publication of budget statements

5. For the purposes of section 52(3)(b) of the 1998 Act, every budget statement shall be published by—

- (a) supplying copies to the Secretary of State for Education and Employment in accordance with regulation 6; and
- (b) making a copy available for reference by parents and other persons at all reasonable times and without charge at each education office of the authority.

6.—(1) Three copies of Parts 1 and 2 of the budget statement shall be supplied to the Secretary of State for Education and Employment in paper form and one copy in the form of machine readable data by E-mail or on a floppy disc provided for that purpose by the Secretary of State.

(2) Three copies of Parts 3 and 4 of the budget statement shall be supplied to the Secretary of State for Education and Employment in paper form except that if a copy of Part 4 is also supplied in the form of machine readable data only one copy of that Part need be supplied in paper form.

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(3) Any computer language or software used to supply tables must be one which the Secretary of State for Education and Employment has notified to the authority.

7.—(1) A budget statement shall be published before the beginning of the financial year to which it relates.

(2) A budget statement may not be revised during the financial year to which it relates other than to correct errors in the statement as previously published.

(3) A revised budget statement shall be subject to regulations 4, 5, 6, 7(2) and 8.

8. The authority shall furnish the governing body and head teacher of each school maintained by them with a copy of Parts 1, 2 and 3 of the budget statement and with a copy of that part of Part 4 of the budget statement which relates to the school in question, save that if the governing body or the head teacher so request the authority shall furnish them with a complete copy of Part 4 of the budget statement.

4th March 2000

Estelle Morris
Minister of State,
Department for Education and Employment

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SCHEDULE 1

Regulation 4(1)(a)

FORM OF PART 1 OF A BUDGET STATEMENT

Part 1 of a budget statement (the total planned education spending by the authority) shall be in the following form (including the notes).

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

SS2 EDUCATION BUDGET STATEMENT

Table 1 - LEA-level information

YEAR	2000-1	LEA	Version N°	LEA N°	E-Mail Address			
CONTACT	TEL.	TEL.	Completion Date	Completion Date				
1 LOCAL SCHOOLS BUDGET (LSB)								
1.1 FUNDING COUNTED AS DELEGATED.								
1.1.1	ISB Primary and Special Schools	(a)	(b)	(c)	(d)	(e)	(f)	(g)
1.1.2	ISB Secondary Schools without 6 th Forms							
1.1.3	ISB Secondary Schools with 6 th Forms							
1.1.4	ISB TOTAL							
1.1.5	STANDARDS FUND DEVOLVED GRANT							
1.1.6	TOTAL FUNDING COUNTED AS DELEGATED							
1.2 STRATEGIC MANAGEMENT								
1.2.1	Statutory/regulatory duties							
1.2.2	PRC / redundancy costs							
1.2.3	Existing early retirement costs (commitments entered into by 31/3/99)							
1.2.4	School-specific Contingencies							
1.2.5.1	Staff costs - supply cover (not sickness)							
1.2.5.2	Supply cover - Long term Sickness (not more than 0.1% total Net LSB)							
1.2.6	Miscellaneous (not more than 0.1% total Net LSB)							
1.2.7	Insurance							
1.2.8.1	Museum Services							
1.2.8.2	Library services - Primary and Special Schools							
1.2.9	Licences/subscriptions (not more than 0.1% total Net LSB)							
1.2.10	Joint Use arrangements							
1.2.11	Monitoring National Curriculum Assessment							

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1.3 SPECIFIC GRANTS									
1.3.1 Standards Fund - Non-Devolved									
1.3.2 Non-Standards Fund specific grant (Devolved and Non-Devolved)									
1.4 SPECIAL EDUCATION									
1.4.1 Educational Psychology Service / Assessments and Statementing									
1.4.2 Provision for Pupils with Statements									
1.4.3 Support Services (SEN)									
1.4.3.1 Specialist support, Pupils with Statements									
1.4.3.2 Specialist support, Pupils without Statements									
1.4.4 Promoting Good Practice / Collaboration / Integration									
1.4.5.1 Pupil Referral Units									
1.4.5.2 Behaviour Support Plans									
1.4.6 Education out of school									
1.4.7 LEA functions in relation to child protection									
1.4.8 Fees for Pupils at Independent special schools, & abroad									
1.4.9 Health Service Partnerships/Special Medical attention									
1.5 SCHOOL IMPROVEMENT									
EDP Preparation, Implementation and Review (residual expenditure not shown under other headings)									
1.6 ACCESS									
1.6.1 Asset Management									
1.6.2 School Admissions/Supply of school places									
1.6.3 Excluded pupils									
1.6.4 Home to school transport									
1.6.5 Pupil Support									
1.6.6 Education Welfare Service									
1.6.7.1 School Meals - Primary and Special Schools									
1.6.7.2 Free School Meals - Eligibility									

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1.6.7.3	Milk - not former Grant Maintained schools								
1.6.8	School Kitchens - repair and maintenance								
1.6.9	Fees to independent schools for pupils without statements of special educational need								
1.6.10	Music Service (not Standards Fund supported)								
1.6.11	Visual and Performing Arts (other than music)								
1.6.12	Outdoor Education including Environmental and Field Studies (not sports)								
1.7	BALANCING ENTRY - CLOSING SCHOOLS								
1.8	TOTAL LEA ACTIVITIES WITHIN THE LSB								
1.9	TOTAL EXPENDITURE WITHIN THE LSB								
1.10	NON LSB EXPENDITURE - Inter-authority recoupment								
1.11	TOTAL EXPENDITURE ON SCHOOLS								
2	NON-SCHOOL FUNDING								
2.1	Education for under-fives (including Nursery Schools)								
2.2	Adult/Community education								
2.3	Support for Students								
2.3.1	Mandatory Awards								
2.3.2	Student Support under new arrangements								
2.3.3	Discretionary Awards								
2.4	Home to College Transport (16-18)								
2.5	Residual Pension Liability (e.g. FE, Careers Service etc.)								
2.6	Youth Service								
2.7	TOTAL NON-SCHOOL FUNDING								

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3	TOTAL NON-CAPITAL EXPENDITURE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	CAPITAL EXPENDITURE FROM REVENUE (CERA)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	TOTAL EDUCATION REVENUE EXPENDITURE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MEMORANDUM ITEMS												
6	SPECIAL/SPECIFIC GRANT INCOME IN SUPPORT OF THE ISB (AT LINES 1.1.1 TO 1.1.4)								<input type="text"/>			
7	EDUCATION STANDARD SPENDING ASSESSMENT									<input type="text"/>		
8	CAPITAL EXPENDITURE (excl CERA)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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NOTES TO PART 1

The numbered notes below refer to the item in the table bearing the corresponding number or letter and number.

Where an authority do not plan to make any financial provision for any matter listed in the first column of the form a zero should be entered in the appropriate place.

References in these Notes to deductions are references to deductions from the LSB and references to Schedule 1 are to Schedule 1 to the 2000 Regulations.

H1 Enter in these columns as appropriate, for each of the items in the first column of the form, the amount of the authority's planned expenditure on (a) primary, (b) secondary and (c) special schools, (d) non-school expenditure, (e) the total of the entries in columns (a) to (d) (being the authority's total gross expenditure in respect of that item), (f) the estimated income to be offset against this expenditure and (g) the net estimated expenditure in respect of that item.

In the case of items in columns (a), (b) and (c), an authority must state in the Annex to Part 1 the principal elements of the basis on which they apportion planned expenditure between primary, secondary and special schools. In the case of estimated income in column (f), an authority must provide a list of the principal items of estimated income in the Annex to Part 1.

1 A general heading covering the items comprising the LSB for the financial year in question. All expenditure within the LSB must be attributed by an authority to one of the following seven categories—

- (1.1) Funding counted as delegated to schools
- (1.2) Strategic Management
- (1.3) Specific Grants
- (1.4) Special Education
- (1.5) School Improvement
- (1.6) Access
- (1.7) Closing schools

Funding counted as delegated to schools

- 1.1.1 Enter here the part of the ISB attributable to primary and special schools.
- 1.1.2 Enter here the part of the ISB attributable to secondary schools without sixth forms.
- 1.1.3 Enter here the part of the ISB attributable to secondary schools with sixth forms.
- 1.1.4 Enter here the amount of the ISB for the financial year in question.
- 1.1.5 Enter here all planned expenditure deducted in accordance with paragraphs 1 and 2 of Schedule 1 in relation to Standards Fund grant in cases where decisions about the spending of the grant are delegated to the governing bodies of schools.
- 1.1.6 Enter here the aggregate of 1.1.4 and 1.1.5.

Strategic Management

- 1.2.1. Enter here all planned expenditure deducted in accordance with paragraph 27, except subparagraph (k), and paragraphs 28, 30, 33 and 39 of Schedule 1 and any other expenditure falling within paragraph 27(e) to (g) of that Schedule. Where it is necessary to apportion between those costs incurred in their capacity as a local education authority and those incurred in other capacities under paragraph 27(c) then the authority must set out the basis of the apportionment and other relevant details in the Annex to Part 1.

- 1.2.2. Enter here all planned expenditure deducted in accordance with paragraphs 27(k) and 29 of Schedule 1 where the expenditure first falls to be made on or after 1st April 1999.
- 1.2.3. Enter here all planned expenditure deducted in accordance with paragraphs 27(k) and 29 of Schedule 1 where the expenditure first falls to be made before 1st April 1999.
- 1.2.4. Enter here all planned expenditure deducted in accordance with paragraphs 31 and 32 of Schedule 1.
- 1.2.5. Enter here all planned expenditure deducted in accordance with paragraphs 35, 36 and 37 of Schedule 1.
- 1.2.5. Enter here all planned expenditure deducted in accordance with paragraph 38 of Schedule 1.
- 1.2.6. Enter here all planned expenditure deducted in accordance with paragraph 45 of Schedule 1.
- 1.2.7. Enter here all planned expenditure deducted in accordance with paragraph 34 of Schedule 1.
- 1.2.8. Enter here all planned expenditure deducted in accordance with paragraph 40 of Schedule 1.
- 1.2.8. Enter here all planned expenditure deducted in accordance with paragraph 41 of Schedule 1.
- 1.2.9. Enter here all planned expenditure deducted in accordance with paragraph 42 of Schedule 1.
- 1.2.10. Enter here all planned expenditure deducted in accordance with paragraph 43 of Schedule 1.
- 1.2.11. Enter here all planned expenditure deducted in accordance with paragraph 44 of Schedule 1.

Specific Grants

- 1.3.1. Enter here all planned expenditure deducted in accordance with paragraphs 1 and 2 of Schedule 1 in relation to Standards Fund grant other than in cases where decisions about the spending of the grant are delegated to the governing bodies of schools.
- 1.3.2. Enter here all planned expenditure deducted in accordance with paragraphs 1, 2 and 20(d) of Schedule 1 other than in relation to Standards Fund grant.

Special Education

- 1.4.1. Enter here all planned expenditure deducted in accordance with paragraphs 3 and 4 of Schedule 1.
- 1.4.2. Enter here all planned expenditure deducted in accordance with paragraphs 5, 6 and 7 of Schedule 1.
- 1.4.3. Enter here all planned expenditure deducted in accordance with paragraph 8 of Schedule 1 in so far as it relates to pupils with statements.
- 1.4.3. Enter here all planned expenditure deducted in accordance with paragraph 8 of Schedule 1 in so far as it relates to pupils without statements.
- 1.4.4. Enter here all planned expenditure deducted in accordance with paragraphs 9, 10 and 11 of Schedule 1.
- 1.4.5. Enter here all planned expenditure deducted in accordance with paragraph 12 of Schedule 1 (in so far as it relates to expenditure in relation to pupil referral units).
- 1.4.5. Enter here all planned expenditure deducted in accordance with paragraph 13 of Schedule 1.
- 1.4.6. Enter here all planned expenditure deducted in accordance with paragraph 12 of Schedule 1 (in so far as it relates to expenditure in relation to education otherwise than at school).
- 1.4.7. Enter here all planned expenditure deducted in accordance with paragraph 14 of Schedule 1.
- 1.4.8. Enter here all planned expenditure deducted in accordance with paragraph 15 of Schedule 1.
- 1.4.9. Enter here all planned expenditure deducted in accordance with paragraphs 16 and 17 of Schedule 1.

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School Improvement

1.5. Enter here all planned expenditure deducted in accordance with paragraph 18 of Schedule 1.

Access

1.6.1. Enter here all planned expenditure deducted in accordance with paragraph 19(a) of Schedule 1.

1.6.2. Enter here all planned expenditure deducted in accordance with paragraphs 19(b), (c) and (e) of Schedule 1.

1.6.3. Enter here all planned expenditure deducted in accordance with paragraph 19(d) of Schedule 1.

1.6.4. Enter here all planned expenditure deducted in accordance with paragraph 19(f) of Schedule 1.

1.6.5. Enter here all planned expenditure deducted in accordance with paragraph 19(g) of Schedule 1.

1.6.6. Enter here all planned expenditure deducted in accordance with paragraph 19(h) of Schedule 1.

1.6.7. Enter here all planned expenditure deducted in accordance with paragraphs 20(a) and (b) of Schedule 1.

1.6.7. Enter here all planned expenditure deducted in accordance with paragraph 22 of Schedule 1.

1.6.7. Enter here all planned expenditure deducted in accordance with paragraph 20(c) of Schedule 1.

1.6.8. Enter here all planned expenditure deducted in accordance with paragraph 21 of Schedule 1.

1.6.9. Enter here all planned expenditure deducted in accordance with paragraph 23 of Schedule 1.

1.6.10. Enter here all planned expenditure deducted in accordance with paragraph 24 of Schedule 1.

1.6.11. Enter here all planned expenditure deducted in accordance with paragraph 25 of Schedule 1.

1.6.12. Enter here all planned expenditure deducted in accordance with paragraph 26 of Schedule 1.

Closing schools

1.7. Enter here all planned expenditure deducted in accordance with regulation 5(2) of the 2000 Regulations (closing schools).

1.8. Enter here the aggregate for each column (a) to (g) of the amounts entered for the matters referred to in notes 1.2 to 1.7 which aggregates constitute the total of the planned expenditure deducted by the authority from the LSB, and planned expenditure falling within paragraphs 27(e) to (g) of Schedule 1, for the activities which they carry out.

1.9. Enter here the aggregate for each column (a) to (g) of the amounts entered for the matters referred to in notes 1.1 to 1.7 which aggregates constitute the total of all planned expenditure within the LSB and falling within paragraphs 27(c) to (g) of Schedule 1.

1.10. Enter here expenditure which the authority anticipate will be recouped pursuant to section 492, 493 or 494 of the 1996 Act.

1.11. Enter here the aggregate of the entries in lines 1.9 and 1.10 being the authority's total planned expenditure on schools in the financial year in question.

2. A general heading for notes 2.1 to 2.6 comprising the planned expenditure by the authority upon activities other than those falling within paragraph 1.

(2.1) Enter here all planned expenditure on the provision of education for children under the age of 5 who are not registered pupils in maintained schools.

(2.2) Enter here all planned expenditure on the provision of Adult and Community Education. Where it is necessary to apportion costs between this and other items details of any apportionment should be given in the Annex to Part 1.

(2.3) A heading for planned expenditure on the provision of support for students.

- (2.3.1) Enter here all planned expenditure under section 1(1) of the Education Act 1962(5) (mandatory awards).
- (2.3.2) Enter here all planned expenditure to be incurred by virtue of regulations under section 22 of the Teaching and Higher Education Act 1998(6) (student support).
- (2.3.3) Enter here all planned expenditure under section 1(6) or 2 of the Education Act 1962 (discretionary grants).
- (2.4) Enter here all planned expenditure on the provision of transport under section 509 of the 1996 Act other than in relation to schools (Home to College Transport).
- (2.5) Enter here all planned expenditure on making pension payments other than in respect of schools.
- (2.6) Enter here all planned expenditure on the authority's Youth Service.
- (2.7) Enter here the aggregate for each column of the amounts entered for the matters referred to in notes 2.1 to 2.6.
3. Enter here the aggregate for each column (a) to (g) of the amounts entered for the matters referred to in notes 1.11 and 2.7.
4. Enter here all expenditure treated by the authority as expenditure of a capital nature charged to a revenue account of the authority as defined in section 41(2) of the Local Government and Housing Act 1989(7).
5. Enter here the aggregate for each column (a) to (g) of the amounts referred to in notes 3 and 4.
6. Enter here the amount of any special grants paid in accordance with section 88B of the Local Government Finance Act 1988(8) and any other grants paid to the authority under conditions which impose restrictions on the particular purposes of the authority for which they may be used, which are, in both cases, used to finance expenditure through the ISB.
7. Enter here the authority's Education Standard Spending Assessment for the financial year in question calculated in accordance with the local government finance report for that year made by the Secretary of State under section 78A of the Local Government Finance Act 1988(9).
8. Enter here all capital expenditure being expenditure—
- (a) which the authority propose to capitalise in their accounts in accordance with proper practices being those accounting practices—
- (i) which the authority are required to follow by virtue of any enactment, or
- (ii) which, whether by reference to any generally recognised published code or otherwise, are regarded as proper accounting practices to be followed in the keeping of accounts of local authorities, either generally or of the description concerned, but in the event of any conflict in any respect between the practices falling within (i) above and those falling within (ii) above, only those falling within (i) above are to be regarded as proper practices; and
- (b) which does not fall within note 4 (capital expenditure from revenue).

(5) 1962 c. 12. This act was repealed with transitional and saving provisions by the Teaching and Higher Education Act 1998 (c. 30).

(6) 1998 c. 30.

(7) 1989 c. 42.

(8) 1988 c. 41; section 88B was substituted by the Local Government Finance Act 1992 (c. 14), Schedule 10, paragraph 18.

(9) 1988 c. 41; section 78A was inserted by the Local Government Finance Act 1992 (c. 14), Schedule 10, paragraph 10.

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ANNEX TO PART 1

No form is prescribed for the Annex to Part 1. Authorities may include in the Annex any relevant information in addition to that required by these Regulations to be included in the table in Part 1 or where there is insufficient space in that table.

Where any method of apportionment is adopted for allocating estimated expenditure between primary, secondary, and special schools, or between secondary schools with and without sixth forms, a full explanation of the derivation of the ratios must be given in this Annex, together with information regarding sources and age of data.

SCHEDULE 2

Regulation 4(1)(b)

FORM OF PART 2 OF A BUDGET STATEMENT

Part 2 of a budget statement (school-level information) shall be in the following form (including the notes).

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

SS2 EDUCATION BUDGET STATEMENT **Table 2 - School-level information**

YEAR	2000-1	LEA	LEA N°
CONTACT	TEL.	Version N°	E-Mail Address
		Completion Date	

SUMMARY OF SCHOOLS BUDGETS

(1)	(2)	(3)	(4)	(5)		(6)	(7)	(8)	(9)	(10)	(11)	(12)
SCHOOL NAME	DISE REFERENCE NUMBER	PUPIL NUMBERS (FTE)	FORMULA BUDGET PER SCHOOL £	PER SCHOOL £	PER PUPIL £	BUDGET SHARE	STANDARDS FUND DEVOLVED £	NOTIONAL S.E.N BUDGET £	TRANSITIONAL FUNDING (EX G.M. SCHS) £	SCHOOL OPENING / CLOSING C O R O	DATE OPENING / CLOSING	BUDGET FOR THE PART YEAR £
Primary Schools												
Name												
Name												
Name												
Middle Deemed												
Name												
Name												
Name												
(13) Totals/Average Primary Schools												
Secondary Schools without 6th Forms												
Name												
Name												
Middle Deemed												
Name												

NOTES TO PART 2

The numbered notes below refer to the matters bearing the corresponding number on the tabular part of the form. References in the notes to “the financial year” are references to the financial year to which the budget statement relates.

(1) Enter in column (1) the names of all schools to be maintained by the authority in the financial year in the following order—

- (a) primary schools;
- (b) secondary schools without sixth forms;
- (c) secondary schools with sixth forms; and
- (d) special schools.

(2) Enter in column (2), opposite the name of each school, that school’s DfEE number.

(3) Enter in column (3), opposite the name of each school—

- (a) in the case of a primary or secondary school, the aggregate of—
 - (i) the number of registered pupils at the school required under the allocation formula to be used for the initial determination of that school’s budget share, and
 - (ii) to the extent that numbers in a particular category of pupils are not used for that purpose, the number of such pupils at the school on 20th January 2000; or
- (b) in the case of a special school, the number of places at the school funded by the authority for the financial year.

(4) Enter in column (4), opposite the name of each school, the amount of that part of the school’s budget share for the full year which results from the application of the allocation formula, disregarding any provision for making transitional adjustments under regulation 18 of the 2000 Regulations or adjustments required by reason of the school being maintained for part only of the year.

(5) Enter in column (5), opposite the name of each school, the amount of the school’s budget share for the full year which results from the application of the allocation formula, disregarding any adjustments required by reason of the school being maintained for part only of the year but taking into account any provision for making transitional adjustments under regulation 18 of the 2000 Regulations.

(6) Enter in column (6), opposite the name of each school, the planned expenditure per pupil at the school calculated by dividing the amount entered in accordance with note (5) by the pupil number for the school entered in accordance with note (3).

(7) Enter in column (7), opposite the name of each school, the amount of Standards Fund grant—

- (a) which has been allocated to the school; and
- (b) which the school’s governing body can decide how to spend.

(8) Enter in column (8), opposite the name of each school, the amount of that part of the school’s budget share for the full year which results from the application of the allocation formula in relation to the school’s estimated need to make special educational provision.

(9) Enter in column (9), opposite the name of each school, the amount of that part of the school’s budget share to which the school is entitled for transitional adjustments in accordance with regulation 18 of the 2000 Regulations.

(10) Enter in column (10), opposite the name of each school, the letter “ C” if the school is to close during the financial year and a letter “ O” if the school is to open during the financial year; otherwise leave blank.

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(11) Enter in column (11) the date that such a school is intended to close or to open, as the case may be; otherwise leave blank.

(12) Enter in column (12) the amount of the budget share that a school which is to open or close during the financial year will receive in respect of that part of the financial year during which it is open; otherwise leave blank.

(13) Enter in these boxes in each of columns (3) to (9) and (12) the aggregate of the numbers entered in each of those columns in respect of primary schools.

(14) Enter in these boxes in each of columns (3) to (9) and (12) the aggregate of the numbers entered in each of those columns in respect of secondary schools without sixth forms.

(15) Enter in these boxes in each of columns (3) to (9) and (12) the aggregate of the numbers entered in each of those columns in respect of secondary schools with sixth forms.

(16) Enter in these boxes in each of columns (3) to (9) and (12) the aggregate of the numbers entered in each of those columns in respect of special schools.

(17) Enter in these boxes in each of columns (3) to (5), (7) to (9) and (12) the aggregates of the numbers entered in each of those columns in accordance with notes (13) to (16).

(18) Enter in this box the amount of the ISB not allocated to schools' budget shares at the beginning of the financial year.

(19) Enter in this box the amount of Standards Fund grant—

- (a) which it is anticipated will be paid to the authority on condition that decisions about the spending of the grant are taken by the governing bodies of schools; and
- (b) which has not yet been allocated to a particular school.

SCHEDULE 3

Regulation 4(1)(c)

FORM OF PART 3 OF A BUDGET STATEMENT

Part 3 of a budget statement (information about the allocation formula) shall be in the following form (including the notes).

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

S52 EDUCATION BUDGET STATEMENT

Table 3: Formula Factors

YEAR	LEA	LEA N ^o	E-Mail Address
CONTACT	TEL.	Version N ^o	Completion Date

PRIMARY AND SECONDARY SCHOOLS (3)

A PUPIL-LED FUNDING (4)

Factor Name (5)	Year Group (6)	Pupil (7) Numbers	Funding (8) per Pupil £	Funds (9) Allocated £	% of primary (10) and secondary schools budgets	FMS Regs Xref
Age weighted funding						
Weighting Ratios (11)						
Age						
Nursery Education						
Sixth Form Subject						
Boarding - place-led						
Totals (12)	Primary					
	Secondary without 6 th Form					
	Secondary with 6 th Form					
	Total					
Method	Narrative to include method of pupil count and count date(s).					

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Pupil-led SEN funding (13)

Factor Name (14)	Pupil (15) Numbers	Funding (16) per Pupil £	Funds (17) Allocated £	% of primary (18) and secondary schools budgets	FMS Regs Xref
Pupils with Statements Pupils without statements 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					
Totals (19)					
Secondary without 6 th Form					
Secondary with 6 th Form					
Total					
Method					
<i>Narrative defining factors:</i>					

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Other Pupil-Led Factors (20)

Factor Name (21)	Pupil (22) Numbers	Funding (23) per Pupil £	Funds (24) Allocated £	% of primary (25) and secondary schools budgets	FMS Regs Xref
Totals (26)					
Primary					
Secondary without 6 th Form					
Secondary with 6 th Form					
Total					
Method					
<i>Narrative defining factors:</i>					

B SEN Funding (treated as pupil-led (27))

Place-led SEN funding

Factor Name (28)	Numbers (29)	Funding (30) per place £	Funds (31) Allocated £	% of primary (32) and secondary schools budgets	FMS Regs Xref
Totals (33)					
Primary					
Secondary without 6 th Form					
Secondary with 6 th Form					
Total					
Method					
<i>Narrative defining factors:</i>					

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Other SEN Funding treated as pupil-led

Factor Name (34)	Numbers (35)	Funding (36) per pupil or place £	Funds (37) Allocated £	% of primary (38) and secondary schools budgets	FMS Regs Xref
<p style="text-align: center;">Totals (39)</p> <p>Primary</p> <p>Secondary without 6th Form</p> <p>Secondary with 6th Form</p> <p>Total</p>					
<i>Narrative defining factors.</i>					

TOTAL OF FUNDING PUPIL-LED OR TREATED AS PUPIL-LED (40)

Primary	
Secondary without 6 th Form	
Secondary with 6 th Form	
TOTAL	

C OTHER FUNDING (41)

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Additional Educational Needs Factor

Factor Name (42)	Type (43)	Number (44)	Rate (45)	Funds Allocated (46)	FMS Regs Xref
			£	£	
Totals (47)					
				Primary	
				Secondary without 6 th Form	
				Secondary with 6 th Form	
				Total	
Method					
<i>Narrative defining factors:</i>					

Site specific factors

Factor Name (48)	Type	Number	Rate	Funds Allocated	FMS Regs Xref
			£	£	
Totals					
				Primary	
				Secondary without 6 th Form	
				Secondary with 6 th Form	
				Total	
Method					
<i>Narrative defining factors:</i>					

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Factor Name (49)	Type	Number	Rate	Funds Allocated	FMS Regs Xref
			£	£	
Totals					
			Primary		
			Secondary without 6 th Form		
			Secondary with 6 th Form		
			Total		
Method					
<i>Narrative defining factors</i>					

Budget adjustments					
Factor Name (50)	Type	Number	Rate	Funds Allocated	FMS Regs Xref
<i>Redetermination in -year including Prior Year adjustments</i>			£	£	
Totals					
			Primary		
			Secondary without 6 th Form		
			Secondary with 6 th Form		
			Total		
Method					
<i>Narrative defining factors, particularly the criteria used for in-year redeterminations</i>					

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Total primary and secondary funds (51)		Primary	
allocated for other factors		Secondary without 6th Form	
		Secondary with 6th Form	
		Total	
Transitional Funding to schools which (52)		Primary	
were Grant-Maintained at 31 March 1999		Secondary without 6th Form	
		Secondary with 6th Form	
		Total	
Unallocated Reserve (53)		Primary	
		Secondary without 6th Form	
		Secondary with 6th Form	
		Total	
D Total amount allocated to primary and secondary schools (54)		Primary	
		Secondary without 6th Form	
		Secondary with 6th Form	
		Total	

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

SPECIAL SCHOOLS (s1)

E PLACE-LED FUNDING (s2)

Factor Name (s3)	Place (s4) Numbers	Funding (s5) per Place £	Funds (s6) Allocated £	FMS Regs Xref
Totals (s7)				
Method				

F PUPIL-LED FUNDING (s8)

Factor Name (s9)	Year/Age Group (s10)	Pupil (s11) Numbers	Funding (s12) per Pupil £	Funds (s13) Allocated £	FMS Regs Xref
Age weighted funding					
Weighting Ratios (s14)					
Totals (s15)					
Method	Narrative to include method of pupil count and count date.				

Other Pupil-Led Factors (s16)

Factor Name (s17)	Pupil (s18) Numbers	Funding (s19) per Pupil £	Funds (s20) Allocated £	FMS Regs Xref
Totals (s21)				
Method	Narrative defining factors:			

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Total special school funds allocated according to pupil numbers or counted as pupil-led (s22)

G OTHER FACTORS (s23)

Additional Educational Needs Factor

Factor Name (s24)	Number (s25)	Rate (s26)	Funds Allocated (s27)	FMS Regs Xref
		£	£	
Total Funds allocated on AEN factors (s28)				
Method				
<i>Narrative to include method of pupil count and count date(s).</i>				

Site specific factors

Factor Name (s29)	Number	Rate	Funds Allocated	FMS Regs Xref
		£	£	
Method				
<i>Narrative defining factors</i>				
Total funds allocated on site specific factors				

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

School specific factors

Factor Name (330)	Number	Rate	Funds Allocated	FMS Regs Xref
		£	£	
<i>Narrative defining factors</i>				
Total funds allocated for school specific factors				

Budget adjustments (331)

Factor Name (332)	Funds (333) Allocated	FMS Regs Xref
<i>Redetermination in -year including Prior Year adjustments</i>	£	
<i>Method</i>		
<i>Narrative defining factors, particularly the criteria used for in-year redeterminations.</i>		

Total funds allocated for budget adjustment factors (334)

Total special school funds (335) allocated for non pupil-led factors

Transitional funding to special schools (336) which were Grant Maintained at 31 March 1999

Unallocated Reserve - special schools(337)

H TOTAL FUNDS ALLOCATED TO SPECIAL SCHOOLS (338)

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

I	TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (i.e. the ISB) (£)

NOTES TO PART 3

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

The table must include a description of each factor used including the full methodology of the factor. This description can either be given in the lines headed "Method" or at the end of the table. The column in the table headed "FMS Regs X ref" must give the particular provision of the 2000 Regulations which permits that factor to be used.

PRIMARY AND SECONDARY SCHOOLS

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

PUPIL-LED FUNDING

A

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

4. 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 attends.

5. Enter in this column (5) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to age, age group, year group or subject taught.

6. Enter in this column (6), opposite each factor in column (5), and in ascending order each relevant year, age group or year group 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. Where full-time equivalents are used in the calculation, the actual numbers must also be provided in a separate note.

7. Enter in this column (7), opposite each entry in column (6), 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 pursuant to regulation 11 of the 2000 Regulations but ignoring any weighting in accordance with paragraph (8) of that regulation or any adjustment under paragraph (9) of that regulation.

8. Enter in this column (8), opposite each entry in column (6), the amount attributed to each pupil in that year, age group or year group.

9. Enter in this column (9), opposite each entry in column (6), the amounts produced by multiplying the amount in column (8) by the number in column (7).

10. Enter in this column (10), as part of the totals given in line (12), the aggregate of the amounts in column (9) expressed as a percentage of the amount referred to in Section D (total amount of funding allocated to primary and secondary schools).

11. Enter in this column (11) the amounts which represent the weighting given to pupil numbers according to age (including key stage or year group), whether a pupil is provided with nursery education, the subject or course of study in the case of pupils in a sixth form, or the number of places made available for pupils in boarding accommodation other than special schools.

12. Enter here the aggregate of the numbers in column (7) and the aggregate of the amounts in column (9) separately for primary schools, secondary schools without a sixth form and secondary schools with a sixth form and give a total.

13. Pupil-led SEN funding. A sub-heading for the factors which allocate 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, (but excluding any factors where expenditure may be allocated otherwise than on the basis of an equal amount for each pupil to whom the factor applies).

14. Enter in this column (14) each factor in accordance with which equal amounts are attributed to registered pupils at primary and secondary schools who have special educational needs, or who are treated as having such needs.

15. Enter in this column (15), opposite each factor in column (14), the total number of registered pupils at primary and secondary schools to which the factor applies taken into account in the allocation formula pursuant to regulation 11 of the 2000 Regulations but ignoring any weighting in accordance with paragraph (8) of that regulation or any adjustment under paragraph (9) of that regulation.

16. Enter in this column (16), opposite each factor in column (14), the amount attributed to each pupil to whom the factor applies.

17. Enter in this column (17), opposite each factor in column (14), the amounts produced by multiplying the amount for that factor in column (16) by the number for that factor in column (15).

18. Enter in this column (18), as part of the totals given in line (19), the aggregate of the amounts in column (17) expressed as a percentage of the amount referred to in section D (total amount of funding allocated to primary and secondary schools).

19. Enter here the aggregate of the numbers in column (15) and the aggregate of the amounts in column (17) separately for primary schools, secondary schools without a sixth form and secondary schools with a sixth form and give a total.

20. Other Pupil-led Factors. A sub-heading for the factors which allocate the ISB by reference to other pupil-led factors.

21. Enter in this column (21) each factor in accordance with which equal amounts are attributed to registered pupils at primary and secondary schools.

22. Enter in this column (22), opposite each factor in column (21), the total number of registered pupils at primary and secondary schools to which the factor applies taken into account in the allocation formula pursuant to regulation 11 of the 2000 Regulations but ignoring any weighting in accordance with paragraph (8) of that regulation or any adjustment under paragraph (9) of that regulation.

23. Enter in this column (23), opposite each factor in column (21), the amount attributed to each pupil to whom the factor applies.

24. Enter in this column (24), opposite each factor in column (21), the amounts produced by multiplying the amount for that factor in column (23) by the number in column (22).

25. Enter in this column (25), as part of the totals given in line (26), the aggregate of the amounts in column (24) expressed as a percentage of the amount referred to in section D (total amount of funding allocated to primary and secondary schools).

26. Enter here the aggregate of the numbers in column (22) and the aggregate of the amounts in column (24) separately for primary schools, secondary schools without a sixth form and secondary schools with a sixth form and give a total.

SEN FUNDING TREATED AS PUPIL-LED

B

27. A sub-heading for the factors (other than those referred to in Section A) which allocate the ISB on the basis of the relative needs of individual primary and secondary schools to incur expenditure in making special educational provision for pupils with special educational needs.

Place-led SEN funding

28. Enter in this column (28) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to the numbers and kinds of places they provide for pupils with special educational needs.

29. Enter in this column (29), opposite each factor in column (28), the total number of places at primary and secondary schools to which the factor applies.

30. Enter in this column (30), opposite each factor in column (28), the amount attributed to each place to which the factor applies.

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31. Enter in this column (31), opposite each factor in column (28), the amounts produced by multiplying the amount for each place in column (30) by the number of places in column (29).

32. Enter in this column (32), as part of the totals in line (33), the aggregate of the amounts in column (31) expressed as a percentage of the amount referred to in Section D (total amount of funding allocated to primary and secondary schools).

33. Enter here the aggregate of the numbers in column (29) and the aggregate of the amounts in column (31) separately for primary schools, secondary schools without sixth forms and secondary schools with sixth forms and give a total.

Other SEN funding treated as pupil-led

34. Enter in this column (34) each factor in accordance with which amounts are allocated to primary and secondary schools other than by reference to the numbers and kinds of places they provide for pupils with special educational needs.

35. Enter in this column (35), opposite each factor in column (34), the total number of registered pupils to whom that factor applies.

36. Enter in this column (36), opposite each factor in column (34), the amount attributed to each pupil or place to which that factor applies.

37. Enter in this column (37), opposite each factor in column (34), the amounts produced by multiplying the amount in column (36) by the number in column (35).

38. Enter in this column (38), as part of the totals given in line (39), the aggregate of the amounts in column (37) expressed as a percentage of the amount referred to in Section D (total amount of funding allocated to primary and secondary schools).

39. Enter here the aggregate of the numbers in column (35) and the aggregate of the amounts in column (37) separately for primary schools, secondary schools without sixth forms and secondary schools with sixth forms and give a total.

Total primary and secondary funds allocated according to pupil numbers or treated as pupil-led

40. Enter here the aggregate of the amounts entered in lines (12), (19), (26), (33) and (39), separately for primary schools, secondary schools without sixth forms and secondary schools with sixth forms and in total and the aggregate of the percentages entered in columns (10), (18), (25), (32) and (38).

OTHER FUNDING

C

41. A sub-heading for the factors which allocate the ISB by reference to factors other than those referred to in Sections A and B. All factors in this section must be allocated to one of the following groups:

- Additional educational needs,
- Site specific,
- School specific, or
- Budget adjustment.

Additional educational needs factors

42. Enter in this column (42), each factor in accordance with which amounts are allocated to primary and secondary schools for additional educational needs.

43. Enter in this column (43), opposite each factor in column (42), a description of the unit of measurement, formula or method by which amounts are allocated by that factor.

44. Enter in this column (44), opposite each unit of measurement described in column (42), the number of units in question.

45. Enter in this column (45), opposite each unit of measurement described in column (42), the amount attributable to that unit.

46. Enter in this column (46), opposite each unit of measurement in column (42), the amount produced by multiplying the amount in column (45) attributable to each unit of measurement by the number of such units in column (44) or, where the allocation formula does not provide for units of measurement, the amount allocated by the formula or method, for the purposes of all primary and secondary schools.

47. Enter here the aggregate of the amounts in column (46), separately for primary schools, secondary schools without sixth forms and secondary schools with sixth forms and give a total.

Site specific factors

48. Enter in this column (48) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to a school's buildings or grounds. Repeat the format specified in notes 43 to 47 for these site specific factors.

School specific factors

49. Enter in this column (49) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to a school's characteristics. Repeat the format specified in notes 43 to 47 for these school specific factors.

Budget adjustments

50. Enter in this column (50) each factor in accordance with which amounts are allocated to primary and secondary schools pursuant to regulation 15, 16, 19 or 20 of the 2000 Regulations (budget adjustments). Include any adjustments to reflect retrospective pupil number adjustments including excluded pupils. Repeat the format specified in notes 43 to 47 for these budget adjustments.

51. Enter in this column (51) the aggregate of the amounts for additional educational needs, site specific, school specific and budget adjustment factors entered in each case in accordance with note 47 separately for primary schools, secondary schools without sixth forms and secondary schools with sixth forms and give a total.

52. Enter here the transitional funding paid to schools which were grant-maintained schools immediately before 1st April 1999 in accordance with regulation 18 of the 2000 Regulations separately for primary schools, secondary schools without sixth forms and secondary schools with sixth forms and give a total.

53. 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 pursuant to regulation 8(2) of the 2000 Regulations. Show the amounts separately for primary schools, secondary schools without sixth forms, secondary schools with sixth forms and give a total.

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

TOTAL AMOUNT ALLOCATED TO PRIMARY AND SECONDARY SCHOOLS

D

54. Enter here in Section D the aggregate of the amounts entered in accordance with notes 40, 51, 52 and 53, separately for primary schools, secondary schools without sixth forms, secondary schools with sixth forms and in total.

SPECIAL SCHOOLS

s1 A general heading for the schools to which this section of the table relates.

Place-led funding

E

s2 A sub-heading for the factors which allocate the ISB by reference to the numbers and kinds of places special schools provide.

s3 Enter in this column (s3) each factor in the allocation formula in accordance with which amounts are allocated to special schools by reference to the numbers and kinds of places they provide.

s4 Enter in this column (s4), opposite each factor in column (s3), the total number of places to which that factor applies.

s5 Enter in this column (s5), opposite each factor in column (s3), the amount attributed to each place.

s6 Enter in this column (s6), opposite each factor in column (s3), the amounts produced by multiplying the amount in column (s5) by the number in column (s4).

s7 Enter in this line the aggregate of the numbers in column (s4) and the aggregate of the amounts in column (s6).

Pupil-led funding

F

s8 A sub-heading for the factors which allocate the ISB by reference to the numbers of registered pupils at special schools and their ages (or age group or year group to which they belong), 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.

s9 Enter in this column (s9) each factor in accordance with which amounts are allocated to special schools by reference to the numbers and kinds of pupils at the school.

s10 Enter in this column (s10) in ascending order each relevant age, age group or year group applicable in accordance with the allocation formula for the authority's special schools.

s11 Enter in this column (s11), opposite each entry in column (s10), the total number of registered pupils at special schools to whom the factor in column (s9) applies.

s12 Enter in this column (s12), opposite each entry in column (s10), the amount attributed to each pupil to whom the factor in column (s9) applies.

s13 Enter in this column (s13), opposite each entry in column (s10), the amounts produced by multiplying the amount in column (s12) by the number or column (s11).

s14 Enter in this column (s14) the amounts which represent the weighting given to pupil numbers according to age (including key stage or year group).

s15 Enter in this line the aggregate of the numbers in column (s11) and the aggregate of the amounts in column (s13).

Other pupil-led factors

s16 A sub-heading for the factors which allocate the ISB by reference to other pupil-led factors.

s17 Enter in this column (s17) each factor in the allocation formula in accordance with which amounts are allocated to special schools by reference to other pupil-led factors.

s18 Enter in this column (s18), opposite each factor in column (s17), the total number of registered pupils at special schools to whom that factor applies.

s19 Enter in this column (s19), opposite each factor in column (s17), the amount attributed to each pupil to whom that factor applies.

s20 Enter in this column (s20), opposite each factor in column (s17), the amounts produced by multiplying the amount in column (s19) by the number in column (s18).

s21 Enter in this line the aggregate of the numbers in column (s18) and the aggregate of the amounts in column (s20).

s22 Enter here the aggregate of the amounts entered in accordance with notes s7, s15 and s21.

Other factors

G

s23 A sub-heading for the factors which allocate the ISB to special schools otherwise than by reference to the numbers 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,
- School specific, or
- Budget adjustment.

Additional educational needs factors

s24 Enter in this column (s24) each factor in accordance with which amounts are allocated for additional educational needs.

s25 Enter in this column (s25), where appropriate, opposite each factor in column (s24) the number of units of measurement in respect of the factor.

s26 Enter in this column (s26), opposite each factor in column (s24), the amount attributable to each unit of measurement in column (s25).

s27 Enter in this column (s27), opposite each factor in column (s24), the amount produced by multiplying the amount for that factor in column (s26) by the number of units for that factor in column (s25) or, where the allocation formula does not provide for units of measurement, the amount for that factor for the purposes of all special schools.

s28 Enter here the aggregate of the amounts in column (s27).

Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.

Site specific factors

s29 Enter in this column (s29) each factor in accordance with which amounts are allocated by reference to a special school's buildings or grounds. Repeat the format specified in notes s25 to s28 for these site specific factors.

School specific factors

s30 Enter in this column (s30) each factor in accordance with which amounts are allocated by reference to a school's characteristics. Repeat the format specified in notes s25 to s28 for these school specific factors.

Budget adjustments

s31 A heading for the budget adjustment type factors appearing below.

s32 Enter in this column (s32) each factor in accordance with which amounts are allocated to special schools pursuant to regulation 15, 16, 19 or 20 of the 2000 Regulations (budget adjustments).

s33 Enter in this column (s33), opposite each factor in column (s32), the total amount for that factor for the purposes of all special schools.

s34 Enter here the aggregate of the amounts in column (s33).

Total special school funds allocated for non-pupil-led factors

s35 Enter here the aggregate of the amounts for additional educational needs, site specific, school specific and budget adjustment factors entered in accordance with notes s28 and s34.

Transitional funding

s36 Enter here the transitional funding paid to schools which were grant-maintained special schools immediately before 1st April 1999 in accordance with regulation 18 of the 2000 Regulations.

Unallocated reserve

s37 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 pursuant to regulation 8(2) of the 2000 Regulations.

Total funds allocated to special schools

H

s38 Enter here the aggregate of the amounts entered in accordance with notes s22, s35, s36 and s37.

I TOTAL FUNDS AVAILABLE TO ALL SCHOOLS ("ISB"). Enter here the aggregate of the amounts entered in accordance with notes 54 and s38.

ANNEX TO PART 3

No form is prescribed for the Annex to Part 3. An authority may include in this Annex any relevant information in addition to that required by these Regulations to be included in the table in Part 3 or where there is insufficient space in that table.

Any discrepancy between the amounts allocated to schools shown in Part 3 and the amount of the ISB shown in Part 1 must be explained fully in this Annex.

SCHEDULE 4

Regulation 4(1)(d)

CONTENTS OF PART 4 OF A BUDGET STATEMENT

The authority shall set out in respect of each school which they maintain all factors in Part 3 of the budget statement together with such other information referred to in that Part as applies in relation to the application of those factors to schools. Where a factor does not apply to a particular school a zero shall be entered against that factor.

EXPLANATORY NOTE

(This note is not part of the Regulations)

These Regulations prescribe the form and contents of the budget statement of a local education authority in England for the financial year beginning on 1st April 2000 under section 52(1) of the School Standards and Framework Act 1998.