
STATUTORY INSTRUMENTS

2001 No. 569

EDUCATION, ENGLAND

The Education (Budget Statements) (England) Regulations 2001

Made - - - - 22nd February 2001
Laid before Parliament 1st March 2001
Coming into force - - 22nd March 2001

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 2001 and shall come into force on 22nd March 2001.

(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 2001.

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 2000 Budget Statements Regulations” means the Education (Budget Statements) (England) Regulations 2000(3);

“the 2001 Regulations” means the Financing of Maintained Schools (England) Regulations 2001(4);

“allocation formula” means the authority’s formula under regulation 10 of the 2001 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. 2000/576.

(4) S.I. 2001/475.

- “Class Size grant” means grant paid in accordance with section 3 of the 1998 Act;
- “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;
- “Education Budget Support Grant” means the grant known as Education Budget Support Grant paid in accordance with section 88B of the Local Government Finance Act 1988(5);
- “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;
- “School Standards Grant” means the grant known as School Standards Grant paid in accordance with section 88B of the Local Government Finance Act 1988, which in the case of primary, secondary and special schools is paid on condition that it is appropriated to the ISB;
- “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 (5) or any adjustment under paragraph (6) of regulation 11 of the 2001 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

(5) 1988 c. 41; section 88B was substituted by paragraph 18 of Schedule 10 to the Local Government Finance Act 1992 (c. 14).

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.

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

3.—(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

4. 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 5; 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.

5.—(1) Three copies of Parts 1 to 3 and two copies of Part 4 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) The font size used must be not less than 7pt and there must be no shading nor colouring of cells.

(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.

6.—(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 3,4, 5, 6(2) and 7.

7. 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.

22nd February 2001

Estelle Morris
Minister of State,
Department for Education and Employment

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

SCHEDULE 1

Regulation 3(1)(a)

FORM OF PART 1 OF BUDGET STATEMENT

Part 1 of a budget statement (the total planned education spending by the authority) shall be in the following form and in accordance with 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 1 - LEA-level information**

YEAR	2001-2	LEA	LEA N°	E-Mail Address		Total Net LEA-Budget £ (g)			
				Table version N°	Completion Date				
CONTACT	TEL.								
H1				Primary £ (a)	Secondary £ (b)	Special £ (c)	Non-school £ (d)	Total Gross £ (e)	Estimated Income £ (f)
1	LOCAL SCHOOLS BUDGET (LSB)								
1.1	ISB INCLUDING SSG AND STANDARDS FUND DEVOLVED GRANT								
1.1.1	ISB Primary and Special Schools (not SSG)								
1.1.2	ISB Secondary Schools without 6 th Forms (not SSG)								
1.1.3	ISB Secondary Schools with 6 th Forms (not SSG)								
1.1.4	School Standards Grant								
1.1.5	ISB TOTAL								
1.1.6	STANDARDS FUND DEVOLVED GRANT - REVENUE								
1.1.7	TOTAL ISB (INCLUDING SSG) AND STANDARDS FUND DEVOLVED GRANT								
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								
1.2.12	Total strategic management								

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1.3 SPECIFIC GRANTS - REVENUE									
1.3.1 Standards Fund – Non-Devolved									
1.3.2 Non-Standards Fund Specific grant									
1.3.3 Class Size Grant (Revenue only)									
1.3.4 Total specific grants									
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									
1.4.10 Total special education									
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									
1.6.7.3 Milk									
1.6.8 School Kitchens - repair and maintenance									

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1.6.9	Fees for 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)								
1.6.13	Total access								
1.7	TOTAL LEA ACTIVITIES WITHIN THE LSB								
1.8	TOTAL EXPENDITURE WITHIN THE LSB								
1.9	NON LSB EXPENDITURE - Inter-authority recoupment								
1.10	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 and Connexions								
2.7	TOTAL NON-SCHOOL FUNDING								
3	TOTAL NON-CAPITAL EXPENDITURE								
4	CAPITAL EXPENDITURE FROM REVENUE (CERA)								
5	TOTAL EDUCATION REVENUE EXPENDITURE								

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MEMORANDUM ITEMS	
6a Special/specific grant income in support of the ISB (at lines 1.1.1 TO 1.1.4)	<input type="text"/>
6b Education Budget Support Grant income in support of LSB	<input type="text"/>
7 Education Standard Spending Assessment	<input type="text"/>
8 CAPITAL EXPENDITURE (excl CERA)	<input type="text"/>

NOTES TO PART 1

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

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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 2001 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, but not including Education Budget Support Grant income except as a memorandum item at note 6b, and (g) the net planned 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 six categories—

- (1.1) ISB, including School Standards Grant, and devolved Standards Fund grants.
- (1.2) Strategic Management
- (1.3) Specific Grants
- (1.4) Special Education
- (1.5) School Improvement
- (1.6) Access.

(1.1) ISB, including School Standards Grant, and devolved Standards Fund grants

(1.1.1) Enter here the part of the ISB attributable to primary and special schools but excluding School Standards Grant attributable to these schools.

(1.1.2) Enter here the part of the ISB attributable to secondary schools without sixth forms but excluding School Standards Grant attributable to these schools.

(1.1.3) Enter here the part of the ISB attributable to secondary schools with sixth forms but excluding School Standards Grant attributable to these schools.

(1.1.4) Enter here the amount of the School Standards Grant attributable to primary, secondary and special schools and paid as part of the ISB.

(1.1.5) Enter here the amount of the ISB for the financial year in question.

(1.1.6) 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.

(1.1.7) Enter here the aggregate of 1.1.5 and 1.1.6.

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 not forming part of the LSB.

(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 1 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 fell 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.

(1.2.5.1) Enter here all planned expenditure deducted in accordance with paragraphs 35, 36 and 37 of Schedule 1.

(1.2.5.2) 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.

(1.2.8.1) Enter here all planned expenditure deducted in accordance with paragraph 40 of Schedule 1.

(1.2.8.2) 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.

(1.2.12) Enter here for columns (a) to (g) the aggregate of the entries in lines 1.2.1 to 1.2.11.

Specific Grants (Revenue Expenditure)

(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 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 and 2 of Schedule 1 other than in relation to Standards Fund grant and Class Size grant.

(1.3.3) Enter here all planned expenditure of a revenue nature deducted in accordance with paragraphs 1 and 2 of Schedule 1 in relation to Class Size grants.

(1.3.4) Enter here for each column (a) to (c) and (e) to (g) the aggregate of 1.3.1, 1.3.2 and 1.3.3

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.

(1.4.3.1) Enter here all planned expenditure deducted in accordance with paragraph 8 of Schedule 1 in so far as it relates to pupils with statements.

(1.4.3.2) Enter here all planned expenditure deducted in accordance with paragraph 8 of Schedule 1 in so far as it relates to pupils without statements.

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(1.4.4) Enter here all planned expenditure deducted in accordance with paragraphs 9, 10 and 11 of Schedule 1.

(1.4.5.1) Enter here all planned expenditure deducted in accordance with paragraph 12 of Schedule 1 (insofar as it relates to expenditure in relation to pupil referral units).

(1.4.5.2) 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 (insofar 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.

(1.4.10) Enter here for columns (a) to (c) and (e) to (g) the aggregate of lines 1.4.1 to 1.4.9.

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 paragraph 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.

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

(1.6.7.2) Enter here all planned expenditure deducted in accordance with paragraph 22 of Schedule 1.

(1.6.7.3) Enter here all planned expenditure deducted in accordance with paragraphs 20(c) and (d) 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.

(1.6.13) Enter here for columns (a) to (c) and (e) to (g) the aggregate for each of the said columns of lines 1.6.1 to 1.6.12.

(1.7) Enter here the aggregate for each column (a) to (g) of the amounts entered for the matters referred to in notes 1.2. to 1.6 which aggregates constitute the total of the planned expenditure deducted by the authority from the LSB, and planned expenditure falling within paragraph 27(e) to (g) of Schedule 1 not forming part of the LSB, for the activities which they carry out.

(1.8) Enter here the aggregate for each column (a) to (g) of the amounts entered for the matters referred to in notes 1.1 to 1.6 which aggregates constitute the total of all planned expenditure within the LSB and falling within paragraph 27(e) to (g) of Schedule 1 not forming part of the LSB.

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

(1.10) Enter here the aggregate of the entries in lines 1.8 and 1.9 being the authority's total planned expenditure on schools in the financial year in question.

2. A general heading for notes 2.1 to 2.7 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 **(6)** (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 **(7)** (student support).

(2.3.3) Enter here all expenditure under section 1(6) or 2 of the Education Act 1962 (discretionary grants) or under section 518 of the 1996 Act **(8)**, except where an allowance paid under section 518 is not supported by specific grant paid by the Secretary of State.

(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 planning expenditure on the local authority's Youth Service and the local authority's contribution to the Connexions Service, where not already included in the LSB.

(2.7) Enter here the aggregate for columns (d) to (g) 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 1.10 and 2.7.

(6) 1962 c. 12. This Act was repealed with transitional and saving provisions by the Teaching and Higher Education Act 1998 (c. 30).

(7) 1998 c. 30.

(8) Section 518 of the 1996 Act was substituted by section 129 of the 1998 Act.

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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 (9).

5. Enter here the aggregate for each column (a) to (g) of the amounts referred to in notes 3 and 4.

6a. Subject to note 6b below, enter here the amount of any special grants paid in accordance with section 88B of the Local Government Finance Act 1988 and any 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, appropriated to the ISB.

6b. Enter here the amount of the Education Budget Support Grant.

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(10)

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).

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 the 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 3(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 and in accordance with the notes.

(9) 1989 c. 42.

(10) Section 78A was inserted by the Local Government Finance Act 1992 (c. 14), Schedule 10, paragraph 10.

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

Table 2A—School Level Information

S52 EDUCATION BUDGET STATEMENT		Table 2A - School-level information			
YEAR	2001-2	LEA	LEA N ^o	E-Mail Address	
CONTACT	TEL.	Table version N ^o .	Completion Date		

SUMMARY OF SCHOOLS BUDGETS									
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
NAME	D/E/E REFERENCE NUMBER	PUPIL NUMBERS (FTE)	ACTUAL BUDGET SHARE	STANDARDS FUND DEVOLVED	NOTIONAL S.E.N BUDGET	SCHOOL OPENING / CLOSING	DATE OPENING / CLOSING		
			£	£	£	C O R O	DDMMYY		
Primary Schools									
Name									
Name									
Name									
Middle Deemed									
Name									
Name									
Name									
(10) Totals/average Primary Schools									
Secondary Schools without 6th Forms									
Name									
Name									
Middle Deemed									
Name									
(11) Totals/average Secondary without 6th Form									

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Secondary Schools with 6 th Forms			
Name			
Name			
Name			
Name			

(12) Totals/average Secondary with 6 th Form				
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Special Schools	
Name	

(13) Totals/average Special Schools			
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TOTALS FOR ALL SCHOOLS (14)			
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Memorandum Items	
(15) Unallocated ISB	
(16) Unallocated Devolved Standards Fund	
(17) Total ISB	
(18) Total devolved Standards Fund	

This should be the same as Table 1 Line 1.1.5., column (g)

This should be the same as Table 1, Line 1.1.6, column (e).

NOTES TO PART 2A

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

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- (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 18th January 2001; or
 - (b) in the case of a special school, the number of places at the school funded by the authority for the financial year.

In the case of a school that will be open for part of the year only, the number determined in accordance with (a) or (b) above shall be reduced to reflect the proportion of the year that the school is to be open.

- (4) Enter in column (4), opposite the name of each school, the whole of the school's budget share.
- (5) Enter in column (5), opposite the name of each school, the planned expenditure per pupil at the school calculated by dividing the amount entered in accordance with note (4) by the number of pupils or places for the school entered in accordance with note (3).
- (6) Enter in column (6), opposite the name for 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.
- (7) Enter in column (7), opposite the name of each school (other than a special school), the amount of that part of the school's budget share which results from the application of the allocation formula in relation to the school's estimated need to make special educational provision.
- (8) Enter in column (8), opposite the name of each school, the letter "C" if the school is to close during the financial year and the letter "O" if the school is to open during the financial year; otherwise leave blank.
- (9) Enter in column (9) the date that such a school is intended to close or to open, as the case may be; otherwise leave blank.
- (10) Enter in these boxes in each of columns (3), (4), (6) and (7) the aggregate of the numbers entered in each of those columns in respect of primary schools and in column (5) the average of the numbers entered in that column in respect of such schools.
- (11) Enter in these boxes in each of columns (3), (4), (6) and (7) the aggregate of the numbers entered in each of those columns in respect of secondary schools without sixth forms, and in column (5) the average of the numbers entered in that column in respect of such schools.
- (12) Enter in these boxes in each of columns (3), (4), (6) and (7) the aggregate of the numbers entered in each of those columns in respect of secondary schools with sixth forms, and in column (5) the average of the numbers entered in that column in respect of such schools.
- (13) Enter in these boxes in each of columns (3), (4) and (6) the aggregate of the numbers entered in each of those columns in respect of special schools, and in column (5) the average of the numbers entered in that column in respect of such schools.
- (14) Enter in these boxes in each of columns (3), (4) and (6) the aggregates of the numbers entered in each of those columns in accordance with notes (10) to (13), and in column (5) the average of the numbers entered in that column.
- (15) Enter in this box the amount of the ISB not allocated to schools' budget shares at the beginning of the financial year.
- (16) Enter in this box the amount of Standards Fund grant—

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- (a) which it is anticipated will be subject to the 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.
- (17) Enter in this box the aggregate of the numbers entered in column (4) in accordance with notes (14) and (15).
- (18) Enter in this box the aggregate of the numbers entered in column (6) in accordance with notes (14) and (16).

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Table 2B—Former Grant-Maintained Schools Transitional Funding Method

S52 EDUCATION BUDGET STATEMENT				Table 2B - Former G.M. Schools Transitional Funding			
YEAR	2001-2	LEA	LEA N°	E-Mail Address			
CONTACT	TEL.	Table version N°.	Completion Date				

SUMMARY OF SCHOOLS' BUDGETS							
(1) NAME	(2) DfEE REF No.	(3) UNPROTECTED BUDGET	(4) DISCOUNTED ELEMENTS	(5) BUDGET NET OF DISCOUNTED ELEMENTS	(6) PROTECTED LEVEL OF FUNDING	(7) TRANSITIONAL FUNDING	(8) BUDGET SHARE (As col (4) in Table 2)
		Including elements shown in (4)	(Included in (3) but excluded in calculating (7))	(3) - (4)		(6) - (5) if (6) > (5)	(3) + (7)
Primary Schools							
Name							
Name							
Middle Deemed							
Name							
(9) Totals - Primary Schs							
Secondary Schools without sixth forms							
Name							
Name							

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Middle Deemed								
Name								
(10) Totals - Secondary Schs without sixth forms								
<hr/>								
Secondary Schools with sixth forms								
Name								
Name								
(11) Totals - Secondary Schools with sixth forms								
<hr/>								
Special Schools								
Name								
Name								
(12) Totals - Special Schs								
<hr/>								
TOTALS for all former GM Schools (13)								

NOTES TO PART 2B

Schools to which this Part refers are schools that were grant-maintained schools or grant-maintained special schools as at 31st March 1999.

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 schools to be maintained by the authority in the financial year in the following order—

- primary schools;
- secondary schools without sixth forms;
- secondary schools with sixth forms; and
- 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, the amount of the school’s budget share, excluding any adjustments for transitional funding in accordance with regulation 20 of the 2001 Regulations.

(4) Enter in column (4), opposite the name of each school, the aggregate of any elements in the school’s budget share which fall to be discounted in calculating the school’s adjusted budget share, as defined in regulation 20 of the 2001 Regulations.

(5) Enter in column (5), opposite the name of each school, the amount obtained by subtracting the amount entered in accordance with note (4) from the amount entered in accordance with note (3).

(6) Enter in column (6), opposite the name of each school, the school’s protected level of funding calculated in accordance with regulation 20 of the 2001 Regulations.

(7) Enter in column (7), opposite the name of each school, the amount obtained by subtracting the amount entered in accordance with note (5) from the amount entered in accordance with note (6), save that where the note (5) figure is greater than the note (6) figure a zero should be entered.

(8) Enter in column (8), opposite the name of each school, the amount that represents the whole of the school’s budget share.

(9) Enter in these boxes in each of columns (3) to (8) the aggregate of the numbers entered in each of those columns in respect of primary schools.

(10) Enter in these boxes in each of columns (3) to (8) the aggregate of the numbers entered in each of those columns in respect of secondary schools without sixth forms.

(11) Enter in these boxes in each of columns (3) to (8) the aggregate of the numbers entered in each of those columns in respect of secondary schools with sixth forms.

(12) Enter in these boxes in each of columns (3) to (8) the aggregate of the numbers entered in each of those columns in respect of special schools.

(13) Enter in these boxes in each of columns (3) to (8) the aggregate of the numbers entered in each of those columns in accordance with notes (9) to (12).

SCHEDULE 3

Regulation 3(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 and in accordance with 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.

Type and factor name	Range or Level	Unit Value £	Pupil/ place Numbers	Funds Allocated £	% of primary & Secondary budgets	Cross ref. to FMS Regulation
SEN - PUPILS WITH STATEMENTS (16) Where more than one method is used to allocate funding, a full explanation of the methodology must be shown for each. <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Band 1					
	Band 2 etc.					
SEN - PUPILS WITHOUT STATEMENTS (17) 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 (21) below. <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Primary					
	Secondary - no sixth form					
	Secondary with sixth form Total					
SEN - PLACE-LED FUNDING TREATED AS PUPIL-LED (18) <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Band 1					
	Band 2 Etc					
	Primary					
OTHER PUPIL-LED FACTORS (19) <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Secondary - no sixth form					
	Secondary with sixth form Total					

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Method	Primary Secondary - no sixth form Secondary with sixth form Total				
TOTAL OF FUNDING TREATED AS PUPIL-LED (20)					
EXCESS SEN FUNDING - PUPILS WITHOUT STATEMENTS (21) Any funding in addition to the limited funding at (17) above.					
Method	Primary Secondary - no sixth form Secondary with sixth form Total				
Other Funding (22)					
ADDITIONAL EDUCATIONAL NEEDS FACTOR (23)					
X%					
Y%					
Z%					
Method	Primary Secondary - no sixth form Secondary with sixth form Total				
Type and factor name SITE SPECIFIC FACTORS (24)					
Range or Level		Unit Value £		Multiplier (25)	Funds Allocated £
					Cross ref. to FMS Regulation

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Method							
SCHOOL SPECIFIC FACTORS (26)							
Method							
BUDGET ADJUSTMENTS (27) <i>e.g. prior year adjustments</i>							
Method							
TRANSITIONAL FUNDING TO SCHOOLS WHICH WERE GRANT-MAINTAINED AT 31 MARCH 1999 (28)							
UNALLOCATED RESERVE (29)							
SCHOOL STANDARDS GRANT (30)							

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	Primary		Unit Value £	Range or Level	Place/ Pupil Numbers	Funds Allocated £	Cross ref. to FMS Regulation
	Secondary - no sixth form	Secondary with sixth form					
TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (31)							
TOTAL FUNDS EXCLUDING TRANSITIONAL FUNDING (32)							100%
SPECIAL SCHOOLS (33)							
Type and factor name							
Place-led funding (34)							
Method							
Pupil-led funding (35)							
Method							
Other factors (36)							
ADDITIONAL EDUCATIONAL NEEDS FACTOR (37)							
Method							

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Type and factor name	Range or Level	Unit Value £	Multiplier	Funds Allocated £	Cross ref. to FMS Regulation
SITE SPECIFIC FACTORS (38)					
<i>Method</i>					
SCHOOL SPECIFIC FACTORS (39)					
<i>Method</i>					
BUDGET ADJUSTMENTS (40) <i>Prior year adjustments</i>					
<i>Method</i>					
TRANSITIONAL FUNDING TO SPECIAL SCHOOLS WHICH WERE GRANT MAINTAINED AT 31 MARCH 1999 (41)					
UNALLOCATED RESERVE (42)					
SCHOOL STANDARDS GRANT (43)					
TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (44)					
TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (45)					

NOTES TO PART 3

1. INDIVIDUAL SCHOOLS BUDGET—FUNDING FACTORS

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.

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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”.

2. PRIMARY AND SECONDARY SCHOOLS

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 pursuant to regulation 11 of the 2001 Regulations but ignoring any weighting in accordance with paragraph (5) of that regulation or any adjustment under paragraph (6) of that regulation; 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, or of boarding accommodation at boarding schools other than special schools, pursuant to regulation 14 of the 2001 Regulations.

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) (total funds excluding transitional funding and School Standards Grant).

10. Enter in this column (10) the particular provision of the 2001 Regulations which permits the factor entered in column (4) to be used.

11. 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.

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

13. Enter in this column (13) the amounts which represent the weighting given 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.

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14. 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.

15. 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 without a sixth form and secondary schools with a sixth form and give a total.

Pupil-led SEN funding

16. Enter in this column each factor relating to pupils with statements of special educational needs 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.

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

Place-led SEN funding treated as pupil-led

18. Enter in this column each factor (other than those referred to in notes (11) to (17) 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.

Other funding treated as pupil-led

19. Enter in this column (19) each factor (other than those referred to in notes (11) to (18) 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, pursuant to regulation 26(1)(b) of the 2001 Regulations.

Total primary and secondary funds treated as pupil-led

20. Enter here the aggregate of the amounts entered in the total boxes in lines (12), (16), (17) (18) and (19), in accordance with note (15) separately for primary schools, secondary schools without a sixth form and secondary schools with a sixth form and in total and the aggregate of the percentages entered in column (9).

Excess SEN funding for pupils without statements

21. Enter in this column each factor relating to pupils without statements of special educational needs which would fall to be entered in column 17 above but for the limiting effect of regulation 26(1) (b) of the 2001 Regulations.

OTHER FUNDING

22. A sub-heading for the factors which allocate the ISB by reference to factors other than those referred to in notes (12) to (19). All factors in this section must be allocated to one of the following groups:

Additional educational needs, or
site specific, or
school specific

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Additional educational needs factors

23. Enter in this column (23) each factor in accordance with which amounts are allocated to primary and secondary schools for additional educational needs.

Site specific factors

24. Enter in this column (24) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to a school's buildings or grounds.

25. Enter in this column (25), opposite each unit of measurement described in columns (24), (26) and (27), the number of units in question.

School specific factors

26. Enter in this column (26) each factor in accordance with which amounts are allocated to primary and secondary schools by reference to a school's characteristics.

Budget adjustments

27. Enter in this column (27) each factor in accordance with which amounts are allocated to primary and secondary schools pursuant to regulation 17, 18, 21, 22, 23, 24 or 25 of the 2001 Regulations (budget adjustments). Include any adjustments to reflect retrospective pupil number adjustments including excluded pupils.

28. Enter here the transitional funding paid to schools which were grant-maintained schools immediately before 1st April 1999 in accordance with regulation 20 of the 2001 Regulations separately for primary schools, secondary schools without a sixth form and secondary schools with a sixth form and give a total.

29. 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 2001 Regulations. Show the amounts separately for primary schools, secondary schools without a sixth form, and secondary schools with a sixth form and give a total.

30. Enter here the School Standards Grant paid to schools separately for primary schools, secondary schools without a sixth form and secondary schools with a sixth form and give a total.

TOTAL AMOUNT ALLOCATED TO PRIMARY AND SECONDARY SCHOOLS

31. Enter here the aggregate of the amounts entered in accordance with notes (20), (21), (23), (24), (26), (27), (28), (29) and (30), separately for primary schools, secondary schools without a sixth form, and secondary schools with a sixth form and in total.

32. Enter here the amount obtained by deducting from the total amount entered at line (31) the total amounts entered at lines (28) and (30) being the total of funding excluding transitional funding and School Standards Grant.

SPECIAL SCHOOLS

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

Place-led funding

34. Enter in this column (34) 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

35. Enter in this column (35) 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

36. 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, or
site specific, or
school specific.

Additional educational needs factors

37. Enter in this column (37) each factor in accordance with which amounts are allocated for additional educational needs.

Site specific factors

38. Enter in this column (38) each factor in accordance with which amounts are allocated by reference to a special school's buildings or grounds.

School specific factors

39. Enter in this column (39) each factor in accordance with which amounts are allocated by reference to a school's characteristics.

Budget adjustments

40. Enter in this column (40) each factor in accordance with which amounts are allocated to special schools pursuant to regulations 17, 18, 21, 22, 23, 24 or 25 of the 2001 Regulations (budget adjustments).

41. Enter here the transitional funding paid to schools which were grant-maintained special schools immediately before 1st April 1999 in accordance with regulation 20 of the 2001 Regulations.

42. 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 2001 Regulations.

43. Enter here the School Standards Grant paid to special schools.

Total funds allocated to special schools

44. Enter here the aggregate of the amounts entered in accordance with notes (34), (35), (37), (38), (39), (40), (41), (42) and (43).

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (ISB)

45. Enter here the aggregate of the amounts entered in accordance with notes (31) and (44).

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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.

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 3(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 indicated in Part 3 of the budget statement, other than in accordance with note 28 or 41 to Schedule 3, together with such other information referred to in that Part as applies in relation to the application of those factors to schools.

Sub-totals shall be provided for each school indicating the aggregate of amounts allocated to that school under each of the following categories:

Mainstream Schools

- 1 Age-weighted funding
- 2 SEN to include
 - pupils with statements of special educational needs
 - pupils without statements
 - place-led funding treated as pupil-led
- 3 Other pupil-led funding
- 4 Additional educational needs
- 5 Site-specific factors
- 6 School-specific factors
- 7 Budget adjustments
- 8 Transitional funding (for schools that were grant-maintained prior to 1st April 1999)
- 9 School Standards Grant
- 10 Total share of the ISB (Mainstream)

Special Schools

- 11 Place-led funding
- 12 Pupil-led funding
- 13 Additional educational needs
- 14 Site-specific factors
- 15 School-specific factors
- 16 Budget adjustments
- 17 Transitional funding (for schools that were grant-maintained prior to 1st April 1999)

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18 School Standards Grant

19 Total share of the Individual Schools Budget (Special)

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 2001 under section 52(1) of the School Standards and Framework Act 1998.