

2008 No. 377

EDUCATION, ENGLAND

The Education  
(Budget Statements) (England)  
Regulations 2008

*Made - - - - - 15th February 2008*

*Laid before Parliament 27th February 2008*

*Coming into force - - 20th March 2008*



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The Secretary of State for Children, Schools and Families makes the following Regulations in exercise of the powers conferred by sections 52(1), (1A), (3) and (4) and 138(7) of the School Standards and Framework Act 1998(a).

**Citation, commencement and application**

1.—(1) These Regulations may be cited as the Education (Budget Statements) (England) Regulations 2008 and come into force on 20th March 2008.

(2) These Regulations apply only in relation to England and only in relation to budget statements prepared for the period prescribed in regulation 3.

**Interpretation**

2.—(1) In these Regulations—

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

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

“the 2000 Act” means the Learning and Skills Act 2000(c);

“the 2002 Act” means the Education Act 2002(d);

“the 2005 Act” means the Education Act 2005(e);

“the 2006 Act” means the Education and Inspections Act 2006(f);

“the 2008 Regulations” means the School Finance (England) Regulations 2008(g);

“adult and community learning” means part-time education (including vocational, social, physical, recreational training and organised leisure-time occupation) provided by a local education authority to persons of any age living or working in their area which is not primary education, secondary education, FE or HE;

“AEN” means additional educational needs comprising—

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(a) 1998 c.31. Section 52 was amended by section 117 of, and paragraphs 2 and 10 of Schedule 18 to, the Education Act 2005. For the meaning of “prescribed” and “regulations”, see section 142(1) of the 1998 Act.

(b) 1996 c.56.

(c) 2000 c.21.

(d) 2002 c.32.

(e) 2005 c.18.

(f) 2006 c.40.

(g) S.I. 2008/228.

- (a) language needs associated with English as an Additional Language (EAL),
- (b) learning needs related to autistic spectrum disorders, dyslexia, dyspraxia, attention deficit hyperactivity disorder, speech and language difficulties, sensory impairment and physical disabilities,
- (c) social need arising from deprivation, and
- (d) other additional learning needs not associated with the matters referred to in (a), (b) or (c), including the need to improve attainment and emotional and behavioural needs;

“allocation formula” means a local education authority’s formula under regulation 9 of the 2008 Regulations used to determine schools’ budget shares;

“AWPU” means age-weighted pupil unit;

“budget statement” means the statement referred to in section 52(1) of the 1998 Act;

“capital expenditure” means expenditure of a local authority which falls to be capitalised in accordance with proper practices, or expenditure which shall be treated as capital expenditure by virtue of any regulations or directions made under section 16 of the Local Government Act 2003(a);

“central expenditure” means the total amount deducted by a local education authority from their schools budget;

“central expenditure limit” means the limit on central expenditure imposed by regulation 7 of the 2008 Regulations;

“centrally retained budgets” means expenditure on the classes or descriptions of planned expenditure specified in Schedule 2 to the 2008 Regulations;

“CERA” means capital expenditure which a local authority expects to charge to a revenue account of the authority as defined in section 22 of the Local Government Act 2003;

“combined services” has the meaning given to that expression in regulation 1(4) of the 2008 Regulations;

“Connexions” means a multi-agency information advice and guidance service for all young people aged 13-19 and for young people up to the age of 25 with learning difficulties or disabilities;

“contribution to combined budgets” means expenditure by a local education authority on combined services;

“Dedicated Schools Grant” (“DSG”) means a grant under that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“devolved” means paid to schools, but not as part of their budget shares;

“discretionary award” means an award which a local education authority may bestow on persons ordinarily resident in their area in connection with attendance on education or training courses or for the purposes of conducting research under the provisions of section 2 of the Education Act 1962(b);

“Education Welfare Service” means a service provided by a local education authority for the purpose of reducing levels of unauthorised absence from schools;

“early years expenditure on the free entitlement” means expenditure on nursery education for three and four year olds provided by PVI providers or in primary schools;

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(a) Regulations made under this section are the Local Authorities (Capital Finance and Accounting) (England) Regulations 2003. S.I. 2003/26 as amended by S.I. 2004/534, 2004/3055 and 2007/573.

(b) Discretionary awards are made under section 2 of the Education Act 1962 (c.12). Section 2 of the Education (Fees and Awards) Act 1983 (c.40) contains a power to make regulations about eligibility for these awards. Regulations made under this section are the Education (Fees and Awards) England Regulations 2007 (S.I. 2007/779 as amended by S.I. 2007/1336 and 2007/2263). Awards may also be made under section 518 of the 1996 Act. This section was substituted by section 129 of the 1998 Act.

“factor” means one of the additional factors or criteria set out in Schedule 3 to the 2008 Regulations which may be taken into account in a local education authority’s formula under regulation 19 of those Regulations;

“FTE” means full time equivalent;

“funding period 1” is the financial year beginning on 1st April 2008;

“funding period 2” is the financial year beginning on 1st April 2009;

“funding period 3” is the financial year beginning on 1st April 2010;

“ghost-funding” means the funding of places in infant classes as a formula factor under paragraph 35 of Schedule 3 to the 2008 Regulations(a);

“HE” means higher education;

“ISB” means the individual schools budget;

“KS” means a key stage as defined in section 82 of the 2002 Act;

“LSC” means the Learning and Skills Council for England(b);

“MFG” means minimum funding guarantee, that is to say the amount calculated in accordance with regulation 20 of, and Schedule 4 to, the 2008 Regulations which must be included in any determination or redetermination of a maintained school’s budget share in accordance with regulation 20 of those Regulations;

“non-devolved” means held as central expenditure;

a reference to “parent partnership” means a reference to planned expenditure on services provided by local education authorities under section 332A of the 1996 Act(c);

“Performance Reward Grant” means a grant of that name paid under section 31 of the Local Government Act 2003 by the Secretary of State to a local authority for the purpose of rewarding improvements in local services;

“place-led funding” means the funding of places in schools where a local education authority exercise their discretion to do so under regulation 16 or 17 of the 2008 Regulations;

“primary or secondary school” means a primary or secondary school which is a community, foundation, voluntary or maintained nursery school;

“proper practices” means those accounting practices which a local authority are required to follow by virtue of any enactment, or which, so far as they are consistent with any such enactment are generally regarded, whether by reference to any generally recognised published code or otherwise, as proper accounting practices to be followed in the keeping of the accounts of local authorities, either generally or of the description concerned;

“prudential borrowing” has the meaning given to that expression in regulation 1(4) of the 2008 Regulations;

“prudential borrowing costs” means expenditure incurred on prudential borrowing;

a reference to “pupil support” means a reference to expenditure on a local education authority’s functions under section 510 and 514 of the 1996 Act (provision of administration of clothing grants and boarding grants) and pursuant to regulations made under section 518(1)(a) of that Act;

“pupil-led funding” means the funding of pupils in maintained schools in accordance with regulation 15, 17(1)(a) or 17(3)(a) of the 2008 Regulations;

“PVI providers” means persons other than governing bodies of primary schools, local education authorities or the proprietors of Academies who provide nursery education for three and four year olds for which no charge is made;

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- (a) Regulation 17 of, and paragraph 35 of Schedule 4 to, the 2008 Regulations enable a local education authority to fund vacant places in infant classes by taking them into account as an additional factor in determining schools’ budget shares for funding periods 1, 2 and 3 where these places would not fall to be funded under any other provision in those Regulations.
- (b) The Learning and Skills Council for England was established under section 1 of the 2000 Act.
- (c) Section 332A was inserted by section 2 of the Special Educational Needs and Disability Act 2001 (c.10).

“school” means a maintained school(a);

“School Development Grant” means a grant of that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“schools specific contingency” has the meaning given to that expression in regulation 1(4) of the 2008 Regulations;

“School Standards Grant – Maintained Schools” means a grant of that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“School Standards Grant (Personalisation) – Maintained Schools” means a grant of that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“School Standards Grant (Personalisation) – Pupil Referral Units” means a grant of that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“School Standards Grant – Pupil Referral Units” means a grant of that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“Standards Fund Grant” means a grant of that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“SEN” means special educational needs, which has the meaning given to that expression by section 312 of the 1996 Act;

“SEN transport” has the meaning given to that expression in regulation 1(4) of the 2008 Regulations;

“Standards Fund Grant” means a grant of that name paid to a local education authority by the Secretary of State under section 14 of the 2002 Act;

“statement”, in relation to a pupil with special educational needs, means a statement made under section 324 of the 1996 Act;

“support for schools in financial difficulty” means a class of planned expenditure which may be deducted from the schools budget of a local education authority under paragraph 32 of Schedule 2 to the 2008 Regulations;

“termination of employment costs” has the meaning given to that expression in regulation 1(4) of the 2008 Regulations;

“youth service” is a service provided by a local education authority under sections 15B(b) and 507A and 507B(c) of the 1996 Act and section 114 of the 2000 Act.

(2) In these Regulations—

- (a) 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 funding periods 1, 2 and 3 but ignoring any weighting in accordance with regulation 15(4) or 17(7) or any adjustments under regulation 15(9) of the 2008 Regulations; and
- (b) a reference to a particular class or description of expenditure in relation to maintained schools and to pupils registered at such schools includes any expenditure of that class or description as the local education authority may incur in relation to Academies(d).

### **Period to which a budget statement must relate**

**3.** For the purposes of section 52(1) of the 1998 Act, the period prescribed in accordance with section 52(1A) is funding periods 1, 2 and 3.

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(a) The definition of “maintained school” for the purposes of these Regulations is that in section 45(1A) of the 1998 Act, which was inserted by paragraph 99 of Schedule 21 to the 2002 Act.

(b) Section 15B was inserted by section 149 of, and paragraphs 1 and 55 of Schedule 9 to, the 2000 Act.

(c) Sections 507A and 507B were inserted by section 6 of the 2006 Act.

(d) Academies were established under section 482 of the 1996 Act. Section 482 was substituted by section 65 of the 2002 Act.

## Form of, and information to be contained in, budget statements

4.—(1) For the purposes of section 52(3)(a) of the 1998 Act, the first budget statement published under these Regulations must be prepared in four parts, and contain the information prescribed for the purposes of section 52(1) of that Act as specified below—

- (a) Part 1 of the first budget statement must be in the form prescribed in Part 1 of Schedule 1, and contain a summary of the amounts of a local education authority's planned expenditure for funding periods 1, 2 and 3 deriving from each of the main sources of funding available to the authority for appropriation under section 45A(2) of the 1998 Act as their schools budgets;
- (b) Part 2 of the first budget statement must be in the forms prescribed in Part 2 of Schedule 1, and contain details of the amounts of a local education authority's planned expenditure for appropriation for meeting classes or descriptions prescribed under sections 45A(1) and 45A(2) of the 1998 Act as their LEA budget and schools budget for funding period 1, and planned expenditure for appropriation as their schools budgets for funding periods 2 and 3 as follows<sup>(a)</sup>—
  - (i) Table 1 for funding period 1 (planned expenditure for the purposes of the LEA and schools budget),
  - (ii) Table 1 for funding period 2 (planned expenditure for the purposes of the schools budget),
  - (iii) Table 1 for funding period 3 (planned expenditure for the purposes of the schools budget),
  - (iv) the Central Expenditure Limit Annex for funding periods 1, 2 and 3,
  - (v) the Early Years Expenditure Annex for funding period 1, and
  - (vi) the Youth Service Annex for funding period 1;
- (c) Part 3 of the first budget statement must be in the forms prescribed in Part 3 of Schedule 1, and contain information relating to the determination of each school's budget share for funding periods 1, 2 and 3;
- (d) Part 4 of the first budget statement must be in the forms prescribed in Part 4 of Schedule 1, and contain information relating to a local education authority's allocation formulae for funding periods 1, 2 and 3.

(2) The information prescribed under paragraph (1) must comprise actual planned figures in respect of funding period 1 and estimated planned figures in respect of funding periods 2 and 3.

(3) For the purposes of section 52(3)(a) of the 1998 Act, the second budget statement published under these Regulations must be prepared in four parts, and contain the information prescribed for the purposes of section 52(1) of that Act in Schedule 2 as specified below—

- (a) Part 1 of the second budget statement must be in the form prescribed in Part 1 of Schedule 2, and contain a summary of the amounts of a local education authority's planned expenditure for funding periods 2 and 3 deriving from each of the main sources of funding available to the authority for appropriation under section 45A(2) of the 1998 Act as their schools budget;
- (b) Part 2 of the second budget statement must be in the forms prescribed in Part 2 of Schedule 2, and contain details of the amounts of a local education authority's planned expenditure for appropriation for meeting the classes or descriptions prescribed under sections 45A(1) and 45A(2) of the 1998 Act as their LEA budget and schools budget for funding period 2, and planned expenditure for appropriation as their schools budget for funding period 3 as follows—

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<sup>(a)</sup> Classes or descriptions of planned expenditure prescribed for the purposes of the LEA budget of a local education authority are set out in Schedule 1 to the 2008 Regulations. Classes or descriptions of planned expenditure prescribed for the purposes of the schools budget of a local education authority are set out in regulation 5 of and Schedule 2 to the 2008 Regulations.

- (i) Table 1 for funding period 2 (planned expenditure for the purposes of the LEA and schools budget),
- (ii) Table 1 for funding period 3 (planned expenditure for the purposes of the schools budget),
- (iii) the Central Expenditure Limit Annex for funding periods 2 and 3,
- (iv) the Early Years Expenditure Annex for funding period 2, and
- (v) the Youth Service Annex for funding period 2;
- (c) Part 3 of the second budget statement must be in the forms prescribed in Part 3 of Schedule 2, and contain information relating to the determination of each school's budget share for funding periods 2 and 3;
- (d) Part 4 of the second budget statement must be in the forms prescribed in Part 4 of Schedule 2, and contain information relating to a local education authority's allocation formulae for funding periods 2 and 3.

(4) The information prescribed under paragraph (3) must comprise actual planned figures in respect of funding period 2 and revised estimated planned figures in respect of funding period 3 in place of the estimated planned figures in the first budget statement.

(5) For the purposes of section 52(3)(a) of the 1998 Act, the third budget statement published under these Regulations must be prepared in four parts, and contain the information prescribed for the purposes of section 52(1) of that Act in Schedule 3, as specified below—

- (a) Part 1 of the third budget statement must be in the form prescribed in Part 1 of Schedule 3, and contain a summary of the amounts of a local education authority's planned expenditure for funding period 3 deriving from each of the main sources of funding available to the authority for appropriation under section 45A(2) of the 1998 Act as their schools budget;
- (b) Part 2 of the third budget statement must be in the forms prescribed in Part 2 of Schedule 3, and contain details of the amounts of a local education authority's planned expenditure for appropriation for meeting the classes or descriptions prescribed under sections 45A(1) and 45A(2) of the 1998 Act as their LEA budget and schools budget for funding period 3 as follows—
  - (i) Table 1 for funding period 3 (planned expenditure for the purposes of the LEA and schools budget),
  - (ii) the Central Expenditure Limit Annex for funding period 3,
  - (iii) the Early Years Expenditure Annex for funding period 3, and
  - (iv) the Youth Service Annex for funding period 3;
- (c) Part 3 of the third budget statement must be in the forms prescribed in Part 3 of Schedule 3, and contain information relating to the determination of each school's budget share for funding period 3;
- (d) Part 4 of the third budget statement must be in the form prescribed in Part 4 of Schedule 3, and contain information relating to a local education authority's allocation formulae for funding period 3.

(6) The information prescribed under paragraph (5) must comprise actual planned figures in respect of funding period 3 in place of the revised estimated planned figures in the second budget statement.

**Manner and time of publication of a budget statement**

5.—(1) For the purposes of section 52(3)(b) of the 1998 Act, a budget statement is published by—

- (a) supplying a copy to the Secretary of State for Children, Schools and Families; and
- (b) making a copy available for inspection at all reasonable times and free of charge—
  - (i) at the offices of the local education authority, and



(ii) on a website maintained by the local education authority and accessible to the public.

(2) The first budget statement must be published before the beginning of funding period 1; the second before the beginning of funding period 2; and the third before the beginning of funding period 3.

(3) A budget statement published under paragraph (2) may not be revised after publication except—

(a) to correct errors contained in it; or

(b) to reflect a redetermination under regulation 12 of the 2008 Regulations (redetermination of schools budgets and individual schools budgets).

(4) Where a local education authority revise a budget statement under paragraph (3), they must ensure that any revised budget statement is in the appropriate form as prescribed in regulation 4, and is published in the manner prescribed in paragraph (1).

(5) A local education authority must provide the governing body and head teacher of each school maintained by them with a copy of Parts 1, 2 and 4 of the first, second and third budget statements before the beginning of funding period 1, 2 and 3, as the case may be.

(6) Where the governing body or head teacher of a school request a copy of Part 3 of any budget statement to which these Regulations relate, a local education authority must provide them with a copy of that Part.

*Jim Knight*

Minister of State

Department for Children, Schools and Families

15th February 2008









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**3 YOUTH AND COMMUNITY**  
 3.0.1 Youth Service  
 3.0.2 Adult and Community Learning  
 3.0.3 Connections  
 3.0.4 Discretionary Awards  
 3.0.5 Student Support under new Arrangements and Mandatory Awards  
 3.0.6 Capital Expenditure from Revenue (CERA) (Youth & Community)  
 3.0.7 Total Youth and Community

**6 Local Authority Education Functions**  
 6.0.1 Statutory/Regulatory Duties  
 6.0.2 Premature retirement costs / Redundancy costs  
 6.0.3 Existing Early Retirement Costs (commitments entered into by 31/03/09)  
 6.0.4 Residual pension liability (eg FE, Career Service, etc.)  
 6.0.5 Joint use arrangements  
 6.0.6 Insurance  
 6.0.7 Monitoring national curriculum assessment  
 6.0.8 Total Local Authority Education Functions

**SPECIFIC GRANTS AND SPECIFIC FORMULA GRANTS**  
 6.1.1 School Development Grant - non-derived  
 6.1.2 Other Statutory Fund Allocation - non-derived  
 6.1.3 Other Specific Grant  
 6.1.4 Total Specific Grants

6.2.1 Capital Expenditure from Revenue (CERA) (LA Education Functions)

7.1.1 Total Schools Budget, Special Education, Learner Support, Access and Youth and Community Budget (including CERA) (Lines 1.8.1 + 2.0.6 + 2.1.9 + 2.3.2 + 3.0.7)

7.1.3 Total LA Education Functions Budget (including CERA) plus (Lines 6.0.1 + 6.1.4 + 6.2.1)

8 Total Schools Budget and Local Authority Education Functions Budget (lines 7.1.1 + 7.1.3)

9 Capital Expenditure (incl CERA)

**MEMORANDUM ITEMS**

10 Expenditure covered by LSC Grant - include below the part of the expenditure recorded in individual lines in the Schools budget that is sponsored by the Learning and Skills Council.

10a.1 SIXTH FORM - Allocation from LSC for 15+ funding for secondary schools included in expenditure 1.0.1 column (c)

10a.2 SIXTH FORM - Allocation from LSC for 15+ funding for special schools included in expenditure 1.0.1 column (d)

10b.1 Sixth form element included at 1.2.1 above for pupils with and without statements

10b.2 Sixth form element included at 1.2.2 above for pupils with SEN, provision not included in line 1.2.1

10b.3 Sixth form element included at 1.2.4 above for pupils at independent special schools and abroad

10b.4 Sixth form element included at 1.2.6 above for pupils at independent schools (pupils without SEN)

10c.1 LSC Threshold and Performance Pay Costs included in expenditure at 1.0.1 column c and d

10c.2 LSC Threshold and Performance Pay Costs included in expenditure at 1.0.1 column c and d

Children, Schools and Families Financial Data Collection

BUDGET - TABLE 1: FUNDING PERIOD 2 - 2009-10

Children, Schools and Families Data Collection

Table 1 - Local Authority Information

|         |         |                                |                                  |                 |
|---------|---------|--------------------------------|----------------------------------|-----------------|
| YEAR    | 2009-10 | Local Education Authority Name | Local Education Authority Number | E-Mail Address  |
| CONTACT | TEL     | Version No                     |                                  | Completion Date |

|   | Nursery<br>(a) | Primary<br>(b) | Secondary<br>(c) | Special<br>(d) | Gross<br>(e) | Income<br>(f) | Net<br>(g) |
|---|----------------|----------------|------------------|----------------|--------------|---------------|------------|
| <b>1 SCHOOLS BUDGET</b>   |                |                |                  |                |              |               |            |
| 1.01 Individual Schools Budget  |                |                |                  |                |              |               |            |
| 1.02 School Standards Grant - Maintained Schools  |                |                |                  |                |              |               |            |
| 1.03 School Standards Grant - Pupil Referral Units  |                |                |                  |                |              |               |            |
| 1.04 School Standards Grant (Personalisation) - Maintained Schools                            |                |                |                  |                |              |               |            |
| 1.05 School Standards Grant (Personalisation) - Pupil Referral Units                          |                |                |                  |                |              |               |            |
| 1.06 School Development Grant   |                |                |                  |                |              |               |            |
| 1.07 Other Standards Fund Allocation - Devolved   |                |                |                  |                |              |               |            |
| 1.08 Threshold and Performance Pay (Devolved)   |                |                |                  |                |              |               |            |
| 1.09 Expenditure for Education of Children under 5s in Private/voluntary/independent settings |                |                |                  |                |              |               |            |
| 1.11 Support for schools in financial difficulty  |                |                |                  |                |              |               |            |
| 1.12 School-specific contingencies  |                |                |                  |                |              |               |            |
| 1.2.1 Provision for pupils with SEN (including assigned resources)                            |                |                |                  |                |              |               |            |
| 1.2.2 Provision for pupils with SEN provision not included in line 1.2.1                      |                |                |                  |                |              |               |            |
| 1.2.3 Support for inclusion   |                |                |                  |                |              |               |            |
| 1.2.4 Fees for pupils at independent special schools & abroad                                 |                |                |                  |                |              |               |            |
| 1.2.5 SEN transport   |                |                |                  |                |              |               |            |
| 1.2.6 Fees to independent schools for pupils without SEN                                      |                |                |                  |                |              |               |            |
| 1.2.7 Inter-authority recruitment   |                |                |                  |                |              |               |            |
| 1.2.8 Contribution to combined budgets  |                |                |                  |                |              |               |            |
| 1.3.1 Pupil Referral Units  |                |                |                  |                |              |               |            |
| 1.3.2 Behaviour Support Services  |                |                |                  |                |              |               |            |
| 1.3.3 Education out of school   |                |                |                  |                |              |               |            |
| 1.3.4. 14 - 16 More practical learning options  |                |                |                  |                |              |               |            |
| 1.3.5 Central expenditure on education of children under 5s                                   |                |                |                  |                |              |               |            |



Children, Schools and Families Financial Data Collection

BUDGET - TABLE 1: FUNDING PERIOD 3 - 2010-11

Children, Schools and Families Data Collection

Table 1 - Local Authority information

| YEAR    | Local Education Authority Name | Local Education Authority Number | E-Mail Address  |
|---------|--------------------------------|----------------------------------|-----------------|
| 2010-11 |                                |                                  |                 |
| CONTACT | TEL                            | Version No                       | Completion Date |

1 SCHOOLS BUDGET

|  | Nursery (a) | Primary (b) | Secondary (c) | Special (d) | Gross (e) | Income (f) | Net (g) |
|--|-------------|-------------|---------------|-------------|-----------|------------|---------|
| 1.0.1 Individual Schools Budget  |             |             |               |             |           |            |         |
| 1.0.2 School Standards Grant - Maintained Schools  |             |             |               |             |           |            |         |
| 1.0.3 School Standards Grant - Pupil Referral Units  |             |             |               |             |           |            |         |
| 1.0.4 School Standards Grant (Personalisation) - Maintained Schools                            |             |             |               |             |           |            |         |
| 1.0.5 School Standards Grant (Personalisation) - Pupil Referral Units                          |             |             |               |             |           |            |         |
| 1.0.6 School Development Grant   |             |             |               |             |           |            |         |
| 1.0.7 Other Standards Fund Allocation - Devolved   |             |             |               |             |           |            |         |
| 1.0.8 Threshold and Performance Pay (Devolved)   |             |             |               |             |           |            |         |
| 1.0.9 Expenditure for Education of Children under 5s in Private/Voluntary/Independent settings |             |             |               |             |           |            |         |
| 1.1.1 Support for schools in financial difficulty  |             |             |               |             |           |            |         |
| 1.1.2 School-specific contingencies  |             |             |               |             |           |            |         |
| 1.2.1 Provision for pupils with SEN (including assigned resources)                             |             |             |               |             |           |            |         |
| 1.2.2 Provision for pupils with SEN, provision not included in the 1.2.1                       |             |             |               |             |           |            |         |
| 1.2.3 Support for inclusion  |             |             |               |             |           |            |         |
| 1.2.4 Fees for pupils at independent special schools & abroad                                  |             |             |               |             |           |            |         |
| 1.2.5 SEN transport  |             |             |               |             |           |            |         |
| 1.2.6 Fees to independent schools for pupils without SEN                                       |             |             |               |             |           |            |         |
| 1.2.7 Inter-authority recruitment  |             |             |               |             |           |            |         |
| 1.2.8 Contribution to combined budgets   |             |             |               |             |           |            |         |
| 1.3.1 Pupil Referral Units   |             |             |               |             |           |            |         |
| 1.3.2 Behaviour Support Services   |             |             |               |             |           |            |         |
| 1.3.3 Education care of school   |             |             |               |             |           |            |         |
| 1.3.4. 14 - 16 More practical learning options   |             |             |               |             |           |            |         |
| 1.3.5 Capital expenditure on education of children under 5s                                    |             |             |               |             |           |            |         |





CENTRAL EXPENDITURE LIMIT: FUNDING PERIODS 1, 2 & 3 - (2008-09 TO 2010-11)

Children, Schools and Families Data Collection

Table 1 - Local Authority information

|         |         |                                |                                  |                |
|---------|---------|--------------------------------|----------------------------------|----------------|
| YEAR    | 2008-09 | Local Education Authority Name | Local Education Authority Number | E-Mail Address |
| CONTACT | TEL     | Version No                     | Completion Date                  |                |

| Central Expenditure Limit =  | must be greater than or equal to |          |          | Schools Budget <sup>16</sup><br>(LSC + LA Contributions) | SECTION 52 Reference                                   |
|--|----------------------------------|----------|----------|--|--|
|  | (A+B)/(C+D)                      | E/F      |          |  |  |
| Individual Schools Budget (pre 16)   | 2008-09                          | 2009-10  | 2010-11  |  | Table 1 line 1.0.1, less (i), (ii) & (v) below         |
| Post 16 funding from the LSC delegated to schools                          | 100,000                          |          |          |  | Table 2 line (35), column 5                            |
| Local Authority Contribution (delegated to schools)                        | 10,000                           |          |          |  | SBS table line 8 (less v) below                        |
| DSG carry forward (delegated to schools) (may be positive or negative)     | 0                                |          |          |  | SBS table line 3; less (v) below                       |
| Sum of (i), (ii) and (v)   | A 110,000                        | 0        | 0        |  | Table 1 line 1.0.9                                     |
| Private, Voluntary and Independent Providers                               | B 12,000                         | 0        | 0        |  | Table 1 lines 1.1.1 to 1.5.9 inclusive + 1.7.1 + 1.7.2 |
| Other centrally retained budgets (excluding those specified above)         | A + B 122,000                    | 0        | 0        |  | SBS table line 3; less (v) above                       |
| Local Authority Contribution (as part of the centrally retained budget)    | v) 4,200                         |          |          |  |  |
| DSG carry forward (not delegated to schools) (may be positive or negative) | w) 0                             |          |          |  |  |
| <b>TOTAL PROPOSED SCHOOLS BUDGET</b>                                       | <b>E 126,200</b>                 | <b>0</b> | <b>0</b> |  |  |
| Individual Schools Budget (pre 16)   | 2007-08                          | 2008-09  | 2009-10  |  | Table 1 line 1.0.1, less (v), (vi) & (x) below         |
| Post 16 funding from the LSC delegated to schools                          | viii) 97,000                     |          |          |  | Table 2 line (35), column 5                            |
| Local Authority Contribution (delegated to schools)                        | ix) 9,700                        |          |          |  | SBS table line 8 (less xi) below                       |
| DSG carry forward (delegated to schools) (may be positive or negative)     | x) 0                             |          |          |  | SBS table line 3; less (v) below                       |
| Sum of (viii) (ix) and (x)   | C 106,700                        | 0        | 0        |  | Table 1 line 1.0.9                                     |
| Private, Voluntary and Independent Providers                               | D 10,000                         |          |          |  | Table 1 lines 1.1.1 to 1.5.9 inclusive + 1.7.1 + 1.7.2 |
| Other centrally retained budgets (excluding those specified above)         | C + D 116,700                    | 0        | 0        |  | SBS table line 3; less (v) above                       |
| Local Authority Contribution (as part of the centrally retained budget)    | vii) 4,000                       |          |          |  |  |
| DSG carry forward (not delegated to schools) (may be positive or negative) | xvi) 0                           |          |          |  |  |
| <b>TOTAL SCHOOLS BUDGET</b>  | <b>F 120,700</b>                 | <b>0</b> | <b>0</b> |  |  |
| Percentage Increase in ISB and PVI (A+B)(C+D) / (C+D)                      | 4.5%                             | 0.0%     | 0.0%     |  |  |
| Percentage Increase in Schools Budget (E/F)                                | 4.6%                             | 0.0%     | 0.0%     |  |  |
| Has the Central Expenditure Limit been breached?                           | Yes                              | No       | No       |  |  |
| Where a breach is shown, has this been agreed with the Schools Forum       |                                  |          |          |  |  |
| Date and Minute of meeting   |                                  |          |          |  |  |

**EARLY YEARS : FUNDING PERIOD 1 - 2008-09**

**Children, Schools and Families Financial Data Collection** **Annex to Table 1: Early Years Expenditure**

|         |         |                                |                                  |                |
|---------|---------|--------------------------------|----------------------------------|----------------|
| YEAR    | 2008-09 | Local Education Authority Name | Local Education Authority Number | E-Mail Address |
| CONTACT | TEL     | Version No                     | Completion Date                  |                |

**EARLY YEARS EXPENDITURE ON THE FREE ENTITLEMENT**

**Expenditure on the free entitlement delegated to early years providers**

- EY1.1 Maintained nursery schools
- EY1.2 Maintained nursery classes in primary schools
- EY1.3 Private, Voluntary and Independent Providers
- EY1.4 Total 2008-09 expenditure on the free entitlement delegated to early years providers**

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**Method of counting children for funding the free entitlement**

- EY2.1 Maintained nursery schools
- EY2.2 Maintained nursery classes in primary schools
- EY2.3 Private, Voluntary and Independent Providers

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**Hourly rate at which the Local Authority funds providers for the free entitlement**

- EY3.1 Maintained nursery schools
- EY3.2 Maintained nursery classes in primary schools
- EY3.31 Private, Voluntary and Independent Providers (average rate)
- EY3.32 Private, Voluntary and Independent Providers (minimum rate)
- EY3.33 Private, Voluntary and Independent Providers (maximum rate)

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**Central Expenditure in respect of the free entitlement to early years**

- EY4.1 Maintained nursery schools
- EY4.2 Maintained nursery classes in primary schools
- EY4.3 Private, Voluntary and Independent Providers
- EY4.4 Total 2008-09 central expenditure in respect of early years education**

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**January 2008 pupil count: children accessing the free entitlement (PTE)**

- EY5.1 Maintained nursery schools
- EY5.2 Maintained nursery classes in primary schools
- EY5.3 Private, Voluntary and Independent Providers
- EY5.4 Total 2008-09 children accessing the free entitlement (PTE)**

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**YOUTH SERVICE ANNEX: FUNDING PERIOD 1 - 2008-09**

**Children, Schools and Families Financial Data Collection      Annex to Table 1: Youth Service**

|                |         |                                  |  |   |  |                        |  |
|----------------|---------|----------------------------------|--|---|--|------------------------|--|
| <b>YEAR</b>    | 2008-09 | <b>Local Education Authority</b> |  | <b>Local Education Authority Number</b> |  | <b>E-Mail Address</b>  |  |
| <b>CONTACT</b> |         | <b>TEL</b>                       |  | <b>Version No</b>                       |  | <b>Completion Date</b> |  |

| <b>YOUTH SERVICE (NET)</b>                                       | <b>LEA Direct Spend</b> | <b>Contracted with Voluntary Organisations</b> | <b>Contracted with Other Organisations</b> | <b>Voluntary Organisations Grant Aid</b> | <b>TOTAL</b> |
|--|-------------------------|--|--|--|--------------|
| <b>Management</b>  |                         |  |  |  |              |
| Full Time  |                         |  |  |  |              |
| Part Time  |                         |  |  |  |              |
| <b>Youth Workers</b>   |                         |  |  |  |              |
| Full Time  |                         |  |  |  |              |
| Part Time  |                         |  |  |  |              |
| <b>Support Staff</b>   |                         |  |  |  |              |
| Full Time  |                         |  |  |  |              |
| Part Time  |                         |  |  |  |              |
| <b>Staff Training</b>  |                         |  |  |  |              |
| <b>Non-Staff Costs</b>   |                         |  |  |  |              |
| <b>Total Running Costs (Table 1, Line 3.0.1, Net)</b>            |                         |  |  |  |              |
| <b>Capital (Table 1, Line 3.0.6, Net, Youth Service element)</b> |                         |  |  |  |              |
| <b>YOUTH SERVICE TOTAL</b>                                       |                         |  |  |  |              |









**Memorandum items**

(36) Academy  
Funding for  
SEN pupils  
that would  
normally be  
delegated

|  |
|--|
|  |
|--|

(37) Total ISB

|  |
|--|
|  |
|--|

(38) Academy  
Specific  
Grants

|  |  |  |
|--|--|--|
|  |  |  |
|--|--|--|

(39)  
Unallocated  
Specific  
Grants

|  |  |  |
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|  |  |  |
|--|--|--|

(40) Total  
Specific  
Grants

|  |  |  |
|--|--|--|
|  |  |  |
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(41)  
Unallocated  
Threshold and  
Performance  
Pay

|  |
|--|
|  |
|--|

(42) Total  
Threshold and  
Performance  
Pay

|  |
|--|
|  |
|--|

(43)  
Unallocated  
funding to  
support  
schools in  
financial  
difficulties

|  |
|--|
|  |
|--|

(44) Total  
funding for  
schools in  
financial  
difficulty

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|--|
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TABLE 2: FUNDING PERIOD 2 - 2009-10

|  |         |                                |  |                                  |  |                 |
|--|---------|--------------------------------|--|----------------------------------|--|-----------------|
| Children, Schools and Families Financial Data Collection |         |                                |  |                                  |  |                 |
| YEAR   | 2009-10 | Local Education Authority Name |  | Local Education Authority Number |  | E-Mail Address  |
| CONTACT  |         | Tel No                         |  | Version No                       |  | Completion Date |

| Nursery / Primary / Secondary schools | (3) Total age-weighted funding £ | (4) Total Additional Pupil Led Funding £ | (5) Total LSC Funding £ | (6) Total AEN - Learning needs associated with EAL £ | (7) Total AEN - Identified Special Educational Needs (pupil led) £ | (8) Total Identified Special Educational Needs (non pupil-led) £ | (9) Total AEN - Other learning needs £ | (10) Total AEN - Social Need £ | (11) Total Site-specific factors (including pupil-led) £ | (12) Total School-specific factors (including pupil-led) £ | (13) Total budget adjustments £ | (14) Minimum funding guarantee £ | (15) TOTAL BUDGET SHARE                               |                      | (18) MFG Variation Applied | Memorandum Items            |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|---------------------------------------|----------------------------------|--|-------------------------|--|--|--|--|--------------------------------|--|--|---------------------------------|----------------------------------|---|----------------------|----------------------------|-----------------------------|---|--|--|---|--------------------------------------|------------------------------------|--|--------------------------|--------------------------------|-------------------------------|-----------------------------|
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  | (16) January 2009 Pupil Couni (FTE registered pupils) | (17) £ per pupil     |                            | Grants                      |   |  |  |   | Other                                |                                    |  |                          |                                | (29) SCHOOL OPENING / CLOSING | (30) DATE OPENING / CLOSING |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            | (19) SCHOOL STANDARDS GRANT | (20) SCHOOL STANDARDS GRANT (PERSONALISATION) | (21) SCHOOL DEVELOPMENT GRANT - MAIN 2008-09 | (22) SCHOOL DEVELOPMENT GRANT - MAIN 2009-10 | (23) SCHOOL DEVELOPMENT GRANT - OTHER 2009-10 | (24) OTHER STANDARDS FUND ALLOCATION | (25) THRESHOLD AND PERFORMANCE PAY | (26) SUPPORT FOR SCHOOLS IN FINANCIAL DIFFICULTY | (27) NOTIONAL SEN BUDGET | (28) LSC Pupils (January 2009) |                               |                             |
| (1) School name                       | (2) DCSF No.                     |  |                         |  |  |  |  |                                |  |  |                                 |                                  | £   |                      |                            | £                           | £   | £  | £  | £   | £                                    | £                                  | £  | £                        | £                              | C OR O                        | dd mm yy                    |
| <b>Place-Led or Pupil-Led Funding</b> |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
| <b>Nursery Schools</b>                |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
| (31) Total/average Nursery Schools    |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
| <b>Primary Schools</b>                |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
| (32) Total/average Primary Schools    |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
| <b>Secondary Schools</b>              |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
|                                       |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   | No Variation Applied |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |
| (33) Total/average Secondary Schools  |                                  |  |                         |  |  |  |  |                                |  |  |                                 |                                  |   |                      |                            |                             |   |  |  |   |                                      |                                    |  |                          |                                |                               |                             |

| Special schools                    |              | (3) Total place led funding £ | (4) Total Pupil Led Funding £ | (6) Total AEN - Learning needs associated with EAL £ | (10) Total AEN -Social Need £ | (11) Total Site-specific factors (including pupil-led) £ | (12) Total School-specific factors (including pupil-led) £ | (13) Total budget adjustments £ | (14) Minimum funding guarantee £ | (15) TOTAL BUDGET SHARE |   |                  |
|------------------------------------|--------------|-------------------------------|-------------------------------|--|-------------------------------|--|--|---------------------------------|----------------------------------|-------------------------|---|------------------|
| (1) School name                    | (2) DCSF No. |                               |                               |  |                               |  |  |                                 |                                  | £                       | (16) January 2009 Pupil Count (FTE registered pupils) | (17) £ per pupil |
|                                    |              |                               |                               |  |                               |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                               |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                               |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                               |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                               |  |  |                                 |                                  |                         |   |                  |
| (34) Total/average Special Schools |              |                               |                               |  |                               |  |  |                                 |                                  |                         |   |                  |
| (35) Total All Schools             |              |                               |                               |  |                               |  |  |                                 |                                  |                         |   |                  |

**Memorandum items**

- (36) Academy Funding for SEN pupils that would normally be delegated
- (37) Total ISB
- (38) Academy Specific Grants
- (39) Unallocated Specific Grants
- (40) Total Specific Grants
- (41) Unallocated Threshold and Performance Pay
- (42) Total Threshold and Performance Pay
- (43) Unallocated funding to support schools in financial difficulties
- (44) Total funding for schools in financial difficulty



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| Memorandum items            |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|-----------------------------|---|--|--|---|--------------------------------------|------------------------------------|--|--------------------------------|-------------------------------|-----------------------------|--|--|
| Grants                      |   |  |  |   |                                      |                                    |  | Other                          |                               |                             |  |  |
| (19) SCHOOL STANDARDS GRANT | (20) SCHOOL STANDARDS GRANT (PERSONALISATION) | (21) SCHOOL DEVELOPMENT GRANT - MAIN 2008-09 | (22) SCHOOL DEVELOPMENT GRANT - MAIN 2009-10 | (23) SCHOOL DEVELOPMENT GRANT - OTHER 2009-10 | (24) OTHER STANDARDS FUND ALLOCATION | (25) THRESHOLD AND PERFORMANCE PAY | (26) SUPPORT FOR SCHOOLS IN FINANCIAL DIFFICULTY | (28) LSC Pupils (January 2009) | (29) SCHOOL OPENING / CLOSING | (30) DATE OPENING / CLOSING |  |  |
| £                           | £   | £  | £  | £   | £                                    | £                                  | £  |                                | C OR O                        | dd mm yy                    |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |  |







**Memorandum items**

(36)  
Academy  
Funding for  
SEN pupils  
that would  
normally be  
delegated

|  |
|--|
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|--|

(37) Total ISB

|  |
|--|
|  |
|--|

(38)  
Academy  
Specific  
Grants

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|--|--|--|
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(39)  
Unallocated  
Specific  
Grants

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|--|--|--|
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|--|--|--|

(40) Total  
Specific  
Grants

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(41)  
Unallocated  
Threshold  
and  
Performance  
Pay

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|--|
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|--|

(42) Total  
Threshold  
and  
Performance  
Pay

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(43)  
Unallocated  
funding to  
support  
schools in  
financial  
difficulties

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(44) Total  
funding for  
schools in  
financial  
difficulty

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TABLE 3b: FUNDING PERIOD 1 - 2008-09

Children, Schools and Families Financial Data Collection Table 3b - School level information

Table with 6 columns: YEAR (2008-09), Local Education Authority Name, Local Education Authority Number, E-Mail Address, CONTACT, Tel No, Version No, Completion Date.

Main funding data table with columns for Special schools, Place-led funding, Pupil-led funding, AEN - Learning needs, AEN - Social Need, Site-specific factors, School-specific factors, and Budget. Includes sub-headers like 'Unit value (£)', 'Total places', and 'Total funding'.





# PART 4

TABLE 4: FUNDING PERIOD 1 - 2008-09

Children, Schools and Families Financial Data Collection

Table 4: Funding Factors

|         |         |                                |                                  |                |
|---------|---------|--------------------------------|----------------------------------|----------------|
| YEAR    | 2008-09 | Local Education Authority Name | Local Education Authority Number | E-Mail Address |
| CONTACT | TEL     | Version No                     | Completion Date                  |                |

**(1) Nursery, Primary and Secondary Schools**

PUPIL COUNT ARRANGEMENTS (2)  
 Supply Method of pupil count, count dates and worked example(s) where appropriate:

(3) Band, Range or Level

(4) Unit Value £

(5) Total allocated through factor

(6) % of Nursery, Primary & Secondary budgets

AGE-WEIGHTED FUNDING (7) Weighting Ratios (8)

| Key Stage | School Year | Age group (pupils' ages as at 31 <sup>st</sup> August 2008) | Weighting Ratios (8) |
|-----------|-------------|---|----------------------|
| -         | Nursery     | 3 yr old  |                      |
| -         | Nursery     | 4 yr old  |                      |
| -         | Reception   |   |                      |
| 1         | 1           | 5   |                      |
|           | 2           | 6   |                      |
|           | 3           | 7   |                      |
| 2         | 4           | 8   |                      |
|           | 5           | 9   |                      |
|           | 6           | 10  |                      |
|           | 7           | 11  |                      |
| 3         | 8           | 12  |                      |
|           | 9           | 13  |                      |
| 4         | 10          | 14  |                      |
|           | 11          | 15  |                      |

Pupil numbers (9)

Re-takes (Year 12+)

|            |  |
|------------|--|
| Nursery:   |  |
| Primary:   |  |
| Secondary: |  |
| Secondary: |  |

Method and worked example(s) where appropriate:

PRE-SCHOOL Pupil-Led Funding (Nursery Classes) (10)

Nursery 3 year olds

Nursery 4 year olds

Nursery:

Primary:

Method and worked example(s) where appropriate:

Pre-School Place-Led Funding (Nursery Classes) (11)

Nursery 3 year olds    
 Nursery 4 year olds

Nursery:   
 Primary:

Method and worked example(s) where appropriate:

KS 1 ALTERNATIVE FUNDING ROUTES FROM 1/9/03 (i.e. not by AWPU) (12)

Class-based   
 Class-based

Nursery:   
 Primary:

Ghost funding   
 Ghost funding

Nursery:   
 Primary:

Method and worked example(s) where appropriate:

Difference in funding for pupils educated additionally at F.E colleges, work based learning providers or other providers of more practical learning options

Method and worked example(s) where appropriate:

FUNDING OF SIXTH FORM PUPILS FROM LEA FUNDS (13)

"Top-up"

Secondary:

Method and worked example(s) where appropriate:

OTHER PLACE-LED FUNDING TREATED AS PUPIL-LED such as in boarding units and hostels (14)

|                      |                      |
|----------------------|----------------------|
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| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |

Nursery:   
 Primary:   
 Secondary:

Method and worked example(s) where appropriate:



LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS (15)

FTE Pupils (LSC Funded)






Method and worked example(s) where appropriate:

AEN - Learning needs associated with EAL (16)













Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (pupil-led) (17)

SEN - pupils with or without statements (pupil-led) Named Pupil Individually Assigned Resources (18)

Nursery

  
  

  
  




Primary

  
  

  
  




Secondary

SEN - pupils with or without statements (pupil-led) Other (19)

Nursery

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| Nursery: |
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Primary

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| Primary: |
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Secondary

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| Secondary: |
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|---|
| Method and worked example(s) where appropriate: |
|   |

SEN - pupils with or without statements (place-led treated as pupil-led) Named Pupil Individually Assigned Resources (20)

Nursery

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| Nursery: |
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Primary

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| Primary: |
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Secondary

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| Secondary: |
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SEN - pupils with or without statements (place-led treated as pupil-led) Other (21)

Nursery

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| Nursery: |
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Primary

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| Primary: |
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Secondary

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| Secondary: |
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|---|
| Method and worked example(s) where appropriate: |
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AEN - Identified Special Educational Needs (non pupil-led) (22)

|            |
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|            |
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

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|---|
| Method and worked example(s) where appropriate: |
|   |

AEN - Other Learning Needs (23)

|            |
|------------|
|            |
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

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|---|
| Method and worked example(s) where appropriate: |
|   |

AEN - Social Needs (24)

|            |
|------------|
|            |
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

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|---|
| Method and worked example(s) where appropriate: |
|   |

Site - Specific Factors (Including pupil-led) (25)

Nursery

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Nursery:

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Primary

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Primary:

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Secondary

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Secondary:

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Method and worked example(s) where appropriate:

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School - Specific Factors (Including pupil-led) (26)

Nursery

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Nursery:

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Primary

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Primary:

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Secondary

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Secondary:

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Method and worked example(s) where appropriate:

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**BUDGET ADJUSTMENTS (27)**

TRANSITIONAL PROVISION (28)

Method and worked example(s) where appropriate:

Nursery:  
Primary:  
Secondary:

ABATEMENT OF Secondary (11-16) FUNDING arising from operation of the Local Education

Method and worked example(s) where appropriate:

Secondary:

MINIMUM FUNDING GUARANTEE (30)

Method and worked example(s) where appropriate:

Nursery:  
Primary:  
Secondary:

**TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (31)**

Method and worked example(s) where appropriate:

Nursery:  
Primary:  
Secondary:

**SPECIAL SCHOOLS (32)**

PLACE-LED FUNDING (33)

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Special

Method and worked example(s) where appropriate:

PUPIL-LED FUNDING (34)

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|  |  |
|  |  |
|  |  |

Special

Method and worked example(s) where appropriate:

AEN - LEARNING NEEDS ASSOCIATED WITH EAL (35)

|  |  |
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|  |  |

Special

Method and worked example(s) where appropriate:

AEN - SOCIAL NEED (36)

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|         |
|---------|
| Special |
|         |

|   |
|---|
| Method and worked example(s) where appropriate: |
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|   |
|   |

SITE - SPECIFIC FACTORS (Including pupil-led) (37)

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|---------|
| Special |
|         |

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| Method and worked example(s) where appropriate: |
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|   |

SCHOOL - SPECIFIC FACTORS (Including pupil-led) (38)

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|         |
|---------|
| Special |
|         |

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |
|   |
|   |

BUDGET ADJUSTMENTS e.g transitional provision (39)

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |
|   |
|   |

|         |
|---------|
| Special |
|         |

MINIMUM FUNDING GUARANTEE (40)

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |
|   |
|   |

|         |
|---------|
| Special |
|         |

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (41)

|         |
|---------|
| Special |
|         |

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (42)

|             |
|-------------|
| All Schools |
|             |

**TABLE 4: FUNDING PERIOD 2 - 2009-10**

**Children, Schools and Families Financial Data Collection**

**Table 4: Funding Factors**

|                |         |                                       |  |   |  |                        |  |
|----------------|---------|---------------------------------------|--|---|--|------------------------|--|
| <b>YEAR</b>    | 2009-10 | <b>Local Education Authority Name</b> |  | <b>Local Education Authority Number</b> |  | <b>E-Mail Address</b>  |  |
| <b>CONTACT</b> |         | <b>TEL</b>                            |  | <b>Version No</b>                       |  | <b>Completion Date</b> |  |

**(1) Nursery, Primary and Secondary Schools**

|  |
|--|
| <b>PUPIL COUNT ARRANGEMENTS (2)</b>  |
| Supply Method of pupil count, count dates and worked example(s) where appropriate: |

|                          |                  |                                    |   |
|--------------------------|------------------|------------------------------------|---|
| (3) Band, Range or Level | (4) Unit Value £ | (5) Total allocated through factor | (6) % of Nursery, Primary & Secondary budgets |
|--------------------------|------------------|------------------------------------|---|

| AGE-WEIGHTED FUNDING (7) |             |   | Weighting Ratios (8) |  |            |  | Pupil numbers (9) |
|--------------------------|-------------|---|----------------------|--|------------|--|-------------------|
| Key Stage                | School Year | Age group (pupils' ages as at 31 <sup>st</sup> August 2009) |                      |  |            |  |                   |
| -                        | Nursery     | 3 yr old  |                      |  | Nursery:   |  |                   |
| -                        | Nursery     | 4 yr old  |                      |  |            |  |                   |
| -                        | Reception   |   |                      |  |            |  |                   |
| 1                        | 1           | 5   |                      |  |            |  |                   |
|                          | 2           | 6   |                      |  |            |  |                   |
|                          | 3           | 7   |                      |  |            |  |                   |
| 2                        | 4           | 8   |                      |  |            |  |                   |
|                          | 5           | 9   |                      |  |            |  |                   |
|                          | 6           | 10  |                      |  |            |  |                   |
|                          | 7           | 11  |                      |  |            |  |                   |
| 3                        | 8           | 12  |                      |  | Primary:   |  |                   |
|                          | 9           | 13  |                      |  |            |  |                   |
| 4                        | 10          | 14  |                      |  | Secondary: |  |                   |
|                          | 11          | 15  |                      |  |            |  |                   |
| Re-takes (Year 12+)      |             |   |                      |  |            |  |                   |
|                          |             |   |                      |  | Secondary: |  |                   |

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |

|  |  |  |
|--|--|--|
| <b>PRE-SCHOOL Pupil-Led Funding (Nursery Classes) (10)</b> |  |  |
| Nursery 3 year olds  |  |  |
| Nursery 4 year olds  |  |  |

|          |  |
|----------|--|
| Nursery: |  |
| Primary: |  |

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |



Pre-School Place-Led Funding (Nursery Classes) (11)

Nursery 3 year olds    
Nursery 4 year olds

Nursery:

Primary:

Method and worked example(s) where appropriate:

KS 1 ALTERNATIVE FUNDING ROUTES FROM 1/9/03 (i.e. not by AWPU) (12)

Class-based

Nursery:

Class-based

Primary:

Ghost funding

Nursery:

Ghost funding

Primary:

Method and worked example(s) where appropriate:

Difference in funding for pupils educated additionally at F.E colleges, work based learning providers or other providers of more practical learning options

Method and worked example(s) where appropriate:

FUNDING OF SIXTH FORM PUPILS FROM LEA FUNDS (13)

"Top-up"

Secondary:

Method and worked example(s) where appropriate:

OTHER PLACE-LED FUNDING TREATED AS PUPIL-LED such as in boarding units and hostels (14)

|  |  |            |  |
|--|--|------------|--|
|  |  | Nursery:   |  |
|  |  |            |  |
|  |  | Primary:   |  |
|  |  |            |  |
|  |  | Secondary: |  |
|  |  |            |  |

Method and worked example(s) where appropriate:

LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS (15)

|                         |  |            |  |
|-------------------------|--|------------|--|
| FTE Pupils (LSC Funded) |  |            |  |
|                         |  | Secondary: |  |

Method and worked example(s) where appropriate:

AEN - Learning needs associated with EAL (16)

|  |  |            |  |
|--|--|------------|--|
|  |  | Nursery:   |  |
|  |  |            |  |
|  |  | Primary:   |  |
|  |  |            |  |
|  |  | Secondary: |  |
|  |  |            |  |

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (pupil-led) (17)

SEN - pupils with or without statements (pupil-led) Named Pupil Individually Assigned Resources (18)

|           |  |  |            |  |
|-----------|--|--|------------|--|
| Nursery   |  |  | Nursery:   |  |
|           |  |  |            |  |
| Primary   |  |  | Primary:   |  |
|           |  |  |            |  |
| Secondary |  |  | Secondary: |  |
|           |  |  |            |  |

SEN - pupils with or without statements (pupil-led) Other (19)

Nursery

|  |  |          |  |
|--|--|----------|--|
|  |  |          |  |
|  |  |          |  |
|  |  | Nursery: |  |
|  |  |          |  |

Primary

|  |  |          |  |
|--|--|----------|--|
|  |  |          |  |
|  |  |          |  |
|  |  | Primary: |  |
|  |  |          |  |

Secondary

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|--|--|------------|--|
|  |  |            |  |
|  |  |            |  |
|  |  | Secondary: |  |
|  |  |            |  |

Method and worked example(s) where appropriate:

SEN - pupils with or without statements (place-led treated as pupil-led) Named Pupil Individually Assigned Resources (20)

Nursery

|  |  |          |  |
|--|--|----------|--|
|  |  |          |  |
|  |  |          |  |
|  |  | Nursery: |  |
|  |  |          |  |

Primary

|  |  |          |  |
|--|--|----------|--|
|  |  |          |  |
|  |  |          |  |
|  |  | Primary: |  |
|  |  |          |  |

Secondary

|  |  |            |  |
|--|--|------------|--|
|  |  |            |  |
|  |  |            |  |
|  |  | Secondary: |  |
|  |  |            |  |

SEN - pupils with or without statements (place-led treated as pupil-led) Other (21)

Nursery

|  |  |          |  |
|--|--|----------|--|
|  |  |          |  |
|  |  |          |  |
|  |  | Nursery: |  |
|  |  |          |  |

Primary

|  |  |          |  |
|--|--|----------|--|
|  |  |          |  |
|  |  |          |  |
|  |  | Primary: |  |
|  |  |          |  |

Secondary

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|--|--|------------|--|
|  |  |            |  |
|  |  |            |  |
|  |  | Secondary: |  |
|  |  |            |  |

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (non pupil-led) (22)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Other Learning Needs (23)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Social Needs (24)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

Site - Specific Factors (Including pupil-led) (25)

Nursery

|  |  |          |
|--|--|----------|
|  |  |          |
|  |  |          |
|  |  |          |
|  |  |          |
|  |  |          |
|  |  | Nursery: |
|  |  |          |

Primary

|  |  |          |
|--|--|----------|
|  |  |          |
|  |  |          |
|  |  |          |
|  |  |          |
|  |  |          |
|  |  | Primary: |
|  |  |          |

Secondary

|  |  |            |
|--|--|------------|
|  |  |            |
|  |  |            |
|  |  |            |
|  |  |            |
|  |  |            |
|  |  | Secondary: |
|  |  |            |

Method and worked example(s) where appropriate:

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|--|

School - Specific Factors (Including pupil-led) (26)

Nursery

|  |  |          |
|--|--|----------|
|  |  |          |
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|  |  |          |
|  |  |          |
|  |  | Nursery: |
|  |  |          |

Primary

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|--|--|----------|
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|  |  |          |
|  |  |          |
|  |  | Primary: |
|  |  |          |

Secondary

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|--|--|------------|
|  |  |            |
|  |  |            |
|  |  |            |
|  |  |            |
|  |  |            |
|  |  | Secondary: |
|  |  |            |

Method and worked example(s) where appropriate:

|  |
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|--|

**BUDGET ADJUSTMENTS (27)**

TRANSITIONAL PROVISION (28)

|            |
|------------|
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

|  |
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|--|

ABATEMENT OF Secondary (11-16) FUNDING arising from operation of the Local Education Authority's formula (29)

|            |
|------------|
| Secondary: |
|            |

Method and worked example(s) where appropriate:

|  |
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|  |
|--|

MINIMUM FUNDING GUARANTEE (30)

|            |
|------------|
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

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|--|
|  |
|--|

**TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (31)**

|            |
|------------|
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

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|                             |
|-----------------------------|
| <b>SPECIAL SCHOOLS (32)</b> |
|-----------------------------|

|                        |
|------------------------|
| PLACE-LED FUNDING (33) |
|------------------------|

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|---------|
| Special |
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|---|
| Method and worked example(s) where appropriate: |
|   |

|                        |
|------------------------|
| PUPIL-LED FUNDING (34) |
|------------------------|

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| Special |
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|---|
| Method and worked example(s) where appropriate: |
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|   |
|---|
| AEN - LEARNING NEEDS ASSOCIATED WITH EAL (35) |
|---|

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| Special |
|         |

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|---|
| Method and worked example(s) where appropriate: |
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|                        |
|------------------------|
| AEN - SOCIAL NEED (36) |
|------------------------|

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|---------|
| Special |
|         |

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|---|
| Method and worked example(s) where appropriate: |
|   |

SITE - SPECIFIC FACTORS (Including pupil-led) (37)

|  |
|--|
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Special

Method and worked example(s) where appropriate:

SCHOOL - SPECIFIC FACTORS (Including pupil-led) (38)

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Special

Method and worked example(s) where appropriate:

BUDGET ADJUSTMENTS e.g transitional provision (39)

Special

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (40)

Special

Method and worked example(s) where appropriate:

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (41)

Special

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (42)

All Schools



TABLE 4: FUNDING PERIOD 3 2010-11

Children, Schools and Families Financial Data Collection

Table 4: Funding Factors

|         |         |                                |  |                                  |  |                 |  |
|---------|---------|--------------------------------|--|----------------------------------|--|-----------------|--|
| YEAR    | 2010-11 | Local Education Authority Name |  | Local Education Authority Number |  | E-Mail Address  |  |
| CONTACT |         | TEL                            |  | Version No                       |  | Completion Date |  |

(1) Nursery, Primary and Secondary Schools

|  |
|--|
| PUPIL COUNT ARRANGEMENTS (2)   |
| Supply Method of pupil count, count dates and worked example(s) where appropriate: |

|                          |                  |                                    |   |
|--------------------------|------------------|------------------------------------|---|
| (3) Band, Range or Level | (4) Unit Value £ | (5) Total allocated through factor | (6) % of Nursery, Primary & Secondary budgets |
|--------------------------|------------------|------------------------------------|---|

| AGE-WEIGHTED FUNDING (7) |             |   | Weighting Ratios (8) |  |            |  | Pupil numbers (9) |
|--------------------------|-------------|---|----------------------|--|------------|--|-------------------|
| Key Stage                | School Year | Age group (pupils' ages as at 31 <sup>st</sup> August 2010) |                      |  |            |  |                   |
| -                        | Nursery     | 3 yr old  |                      |  | Nursery:   |  |                   |
| -                        | Nursery     | 4 yr old  |                      |  |            |  |                   |
| -                        | Reception   |   |                      |  |            |  |                   |
| 1                        | 1           | 5   |                      |  |            |  |                   |
|                          | 2           | 6   |                      |  |            |  |                   |
|                          | 3           | 7   |                      |  |            |  |                   |
| 2                        | 4           | 8   |                      |  |            |  |                   |
|                          | 5           | 9   |                      |  |            |  |                   |
|                          | 6           | 10  |                      |  |            |  |                   |
|                          | 7           | 11  |                      |  |            |  |                   |
| 3                        | 8           | 12  |                      |  | Primary:   |  |                   |
|                          | 9           | 13  |                      |  |            |  |                   |
|                          | 10          | 14  |                      |  | Secondary: |  |                   |
| 4                        | 11          | 15  |                      |  |            |  |                   |
| Re-takes (Year 12+)      |             |   |                      |  |            |  |                   |
|                          |             |   |                      |  | Secondary: |  |                   |

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |

PRE-SCHOOL Pupil-Led Funding (Nursery Classes) (10)

Nursery 3 year olds    
 Nursery 4 year olds

Nursery:   
 Primary:

Method and worked example(s) where appropriate:

Pre-School Place-Led Funding (Nursery Classes) (11)

Nursery 3 year olds    
 Nursery 4 year olds

Nursery:   
 Primary:

Method and worked example(s) where appropriate:

KS 1 ALTERNATIVE FUNDING ROUTES FROM 1/9/03 (i.e. not by AWPU) (12)

Class-based    
 Class-based    
 Ghost funding    
 Ghost funding

Nursery:   
 Primary:   
 Nursery:   
 Primary:

Method and worked example(s) where appropriate:

Difference in funding for pupils educated additionally at F.E colleges, work based learning providers or other providers of more practical learning options

Method and worked example(s) where appropriate:

FUNDING OF SIXTH FORM PUPILS FROM LEA FUNDS (13)

"Top-up"

Three empty rectangular boxes for data entry.

Secondary:

Method and worked example(s) where appropriate:

OTHER PLACE-LED FUNDING TREATED AS PUPIL-LED such as in boarding units and hostels (14)

Three empty rectangular boxes for data entry.

Three empty rectangular boxes for data entry.

Nursery:  
Primary:  
Secondary:

Three empty rectangular boxes for data entry.

Method and worked example(s) where appropriate:

LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS (15)

FTE Pupils (LSC Funded)



Two empty rectangular boxes for data entry.

Secondary:

Method and worked example(s) where appropriate:

AEN - Learning needs associated with EAL (16)

One empty rectangular box for data entry.

One empty rectangular box for data entry.

One empty rectangular box for data entry.

Nursery:  
Primary:  
Secondary:

Three empty rectangular boxes for data entry.

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (pupil-led) (17)

SEN - pupils with or without statements (pupil-led) Named Pupil Individually Assigned Resources (18)

|           |  |  |            |  |
|-----------|--|--|------------|--|
| Nursery   |  |  |            |  |
|           |  |  |            |  |
|           |  |  | Nursery:   |  |
| Primary   |  |  |            |  |
|           |  |  |            |  |
|           |  |  | Primary:   |  |
| Secondary |  |  |            |  |
|           |  |  |            |  |
|           |  |  | Secondary: |  |

SEN - pupils with or without statements (pupil-led) Other (19)

|           |  |  |            |  |
|-----------|--|--|------------|--|
| Nursery   |  |  |            |  |
|           |  |  |            |  |
|           |  |  | Nursery:   |  |
| Primary   |  |  |            |  |
|           |  |  |            |  |
|           |  |  | Primary:   |  |
| Secondary |  |  |            |  |
|           |  |  |            |  |
|           |  |  | Secondary: |  |

Method and worked example(s) where appropriate:

SEN - pupils with or without statements (place-led treated as pupil-led) Named Pupil Individually Assigned Resources (20)

|           |                      |                      |            |                      |
|-----------|----------------------|----------------------|------------|----------------------|
| Nursery   | <input type="text"/> | <input type="text"/> | Nursery:   | <input type="text"/> |
|           | <input type="text"/> | <input type="text"/> |            |                      |
|           | <input type="text"/> | <input type="text"/> |            |                      |
| Primary   | <input type="text"/> | <input type="text"/> | Primary:   | <input type="text"/> |
|           | <input type="text"/> | <input type="text"/> |            |                      |
|           | <input type="text"/> | <input type="text"/> |            |                      |
| Secondary | <input type="text"/> | <input type="text"/> | Secondary: | <input type="text"/> |
|           | <input type="text"/> | <input type="text"/> |            |                      |
|           | <input type="text"/> | <input type="text"/> |            |                      |

SEN - pupils with or without statements (place-led treated as pupil-led) Other (21)

|           |                      |                      |            |                      |
|-----------|----------------------|----------------------|------------|----------------------|
| Nursery   | <input type="text"/> | <input type="text"/> | Nursery:   | <input type="text"/> |
|           | <input type="text"/> | <input type="text"/> |            |                      |
|           | <input type="text"/> | <input type="text"/> |            |                      |
| Primary   | <input type="text"/> | <input type="text"/> | Primary:   | <input type="text"/> |
|           | <input type="text"/> | <input type="text"/> |            |                      |
|           | <input type="text"/> | <input type="text"/> |            |                      |
| Secondary | <input type="text"/> | <input type="text"/> | Secondary: | <input type="text"/> |
|           | <input type="text"/> | <input type="text"/> |            |                      |
|           | <input type="text"/> | <input type="text"/> |            |                      |

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (non pupil-led) (22)

|                      |                      |                      |
|----------------------|----------------------|----------------------|
| <input type="text"/> | Nursery:             | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | Primary:             | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | Secondary:           | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Method and worked example(s) where appropriate:

AEN - Other Learning Needs (23)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Social Needs (24)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

Site - Specific Factors (Including pupil-led) (25)

Nursery

|  |  |
|--|--|
|  |  |
|  |  |
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|  |  |
|  |  |
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|          |
|----------|
| Nursery: |
|----------|

Primary

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|  |  |
|  |  |
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| Primary: |
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Secondary

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|  |  |
|  |  |

|            |
|------------|
| Secondary: |
|------------|

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |

School - Specific Factors (Including pupil-led) (26)

Nursery

|  |  |
|--|--|
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|  |  |
|  |  |
|  |  |

|          |
|----------|
| Nursery: |
|----------|

Primary

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|          |
|----------|
| Primary: |
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Secondary

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|  |  |

|            |
|------------|
| Secondary: |
|------------|

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |

**BUDGET ADJUSTMENTS (27)**

TRANSITIONAL PROVISION (28)

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

ABATEMENT OF Secondary (11-16) FUNDING arising from operation of the Local Education Authority's formula (29)

|            |
|------------|
| Secondary: |
|            |

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (30)

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (31)

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:



**SPECIAL SCHOOLS (32)**

**PLACE-LED FUNDING (33)**

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Special

Method and worked example(s) where appropriate:

**PUPIL-LED FUNDING (34)**

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|  |  |
|  |  |

Special

Method and worked example(s) where appropriate:

**AEN - LEARNING NEEDS ASSOCIATED WITH EAL (35)**

|  |  |
|--|--|
|  |  |
|  |  |

Special

Method and worked example(s) where appropriate:

**AEN - SOCIAL NEED (36)**

|  |  |
|--|--|
|  |  |
|  |  |

Special

Method and worked example(s) where appropriate:

SITE - SPECIFIC FACTORS (Including pupil-led) (37)

|  |  |         |
|--|--|---------|
|  |  | Special |
|  |  |         |
|  |  |         |

Method and worked example(s) where appropriate:

SCHOOL - SPECIFIC FACTORS (Including pupil-led) (38)

|  |  |         |
|--|--|---------|
|  |  | Special |
|  |  |         |
|  |  |         |

Method and worked example(s) where appropriate:

BUDGET ADJUSTMENTS e.g transitional provision (39)

Special

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (40)

Special

Method and worked example(s) where appropriate:

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (41)

Special

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (42)

All Schools

# SCHEDULE 2

Regulation 4(3) – (4)

## FORM OF THE SECOND BUDGET STATEMENT

### PART 1

**SCHOOL BUDGET SUMMARY TABLE FUNDING PERIODS 2 & 3: 2009-10 & 2010-2011**

**Children, Schools and Families Financial Data Collection** **SCHOOL BUDGET SUMMARY TABLE**

|                |                      |                                       |   |                        |  |
|----------------|----------------------|---------------------------------------|---|------------------------|--|
| <b>YEAR</b>    | 2009-10 to 2010-2011 | <b>Local Education Authority Name</b> | <b>Local Education Authority Number</b> | <b>E-Mail Address:</b> |  |
| <b>CONTACT</b> | <b>TEL.</b>          | <b>Version No</b>                     | <b>Completion Date:</b>                 |                        |  |

This table provides an account of the main sources of funding available to the Local Education Authority to support their Schools Budget, including any additional funding

2009-10 2010-11

(a)

(b)

|  |     |     |  |
|--|-----|-----|--|
| 1. Dedicated Schools Grant - Local Education Authority's estimate of pupil numbers               | [ ] | [ ] |  |
| 2. Dedicated Schools Grant - Guaranteed Unit of Funding Per Pupil                                | [ ] | [ ] |  |
| 3.a Estimated Dedicated Schools Grant  | [ ] | [ ] |  |
| 3.b Academy: Estimated Recoupment from Dedicated Schools Grant                                   | [ ] | [ ] |  |
| 3.c Dedicated Schools Grant; amount brought forward  | [ ] | [ ] |  |
| 4. School Standards Grants - including Personalisation   | [ ] | [ ] |  |
| 5. School Development Grant  | [ ] | [ ] |  |
| 6. Other Standards Fund Grants   | [ ] | [ ] |  |
| 7. LSC funding   | [ ] | [ ] |  |
| 8. Local Education Authority additional contribution   | [ ] | [ ] |  |
| 9. Total funding supporting the Schools Budget <span style="float: right;">(lines 3 to 8)</span> | [ ] | [ ] |  |

|  |  |
|--|--|
| <b>SBS Table Notes</b>   |  |
| <b>Note that the information you provide in this section will be taken into account when returned to DCSF.</b> |  |

Children, Schools and Families Financial Data Collection  
 BUDGET - TABLE 1: FUNDING PERIOD 2 - 2009-10

| Children, Schools and Families Data Collection |                                | Table 1 - Local Authority information |                 |
|--|--------------------------------|---------------------------------------|-----------------|
| YEAR   | Local Education Authority Name | Local Education Authority Number      | E-Mail Address  |
| CONTACT  | TEL                            | Version No                            | Completion Date |
|  |                                |                                       |                 |

|  | Nursery<br>(a) | Primary<br>(b) | Secondary<br>(c) | Special<br>(d) | Gross<br>(e) | Income<br>(f) | Net<br>(g) |
|--|----------------|----------------|------------------|----------------|--------------|---------------|------------|
| <b>1 SCHOOLS BUDGET</b>  |                |                |                  |                |              |               |            |
| 1.0.1 Individual Schools Budget  |                |                |                  |                |              |               |            |
| 1.0.2 School Standards Grant - Maintained Schools  |                |                |                  |                |              |               |            |
| 1.0.3 School Standards Grant - Pupil Referral Units  |                |                |                  |                |              |               |            |
| 1.0.4 School Standards Grant (Personalisation) - Maintained Schools                            |                |                |                  |                |              |               |            |
| 1.0.5 School Standards Grant (Personalisation) - Pupil Referral Units                          |                |                |                  |                |              |               |            |
| 1.0.6 School Development Grant   |                |                |                  |                |              |               |            |
| 1.0.7 Other Standard Func Allocation - Devolved  |                |                |                  |                |              |               |            |
| 1.0.8 Threshold and Performance Pay (Devolved)   |                |                |                  |                |              |               |            |
| 1.0.9 Expenditure for Education of Children under 5s in Private/Voluntary/Independent settings |                |                |                  |                |              |               |            |
| 1.1.1 Support for schools in financial difficulty  |                |                |                  |                |              |               |            |
| 1.1.2 School-specific contingents  |                |                |                  |                |              |               |            |
| 1.2.1 Provision for pupils with SEN (including assigned resources)                             |                |                |                  |                |              |               |            |
| 1.2.2 Provision for pupils with SEN, provision not included in line 1.2.1                      |                |                |                  |                |              |               |            |
| 1.2.3 Support for inclusion  |                |                |                  |                |              |               |            |
| 1.2.4 Fees for pupils at independent special schools & abroad                                  |                |                |                  |                |              |               |            |
| 1.2.5 SEN transport  |                |                |                  |                |              |               |            |
| 1.2.6 Fees to independent schools for pupils without SEN                                       |                |                |                  |                |              |               |            |
| 1.2.7 Inter-authority recruitment  |                |                |                  |                |              |               |            |
| 1.2.6 Contribution to combined budgets   |                |                |                  |                |              |               |            |
| 1.3.1 Pupil Referral Units   |                |                |                  |                |              |               |            |
| 1.3.2 Behaviour Support Services   |                |                |                  |                |              |               |            |
| 1.3.3 Education out of school  |                |                |                  |                |              |               |            |
| 1.3.4 14 - 18 More practical learning options  |                |                |                  |                |              |               |            |
| 1.3.5 Capital expenditure on education of children under 5s                                    |                |                |                  |                |              |               |            |

PART 2

|   |  |  |  |  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|--|--|--|
| 1.4.1 School meals - nursery, primary and special schools |  |  |  |  |  |  |  |  |  |  |  |
| 1.4.2 Free school meals - eligibility                     |  |  |  |  |  |  |  |  |  |  |  |
| 1.4.3 Milk  |  |  |  |  |  |  |  |  |  |  |  |
| 1.4.4 School kitchens - repair and maintenance            |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.1 Insurance   |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.2 Museum and Library Services                         |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.3 School admissions                                   |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.4 Licences/Abolitions                                 |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.5 Miscellaneous (not more than 0.1% total of net SB)  |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.6 Servicing of schools fountains                      |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.7 Staff costs - supply cover (not sickness)           |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.8 Supply cover - long term sickness                   |  |  |  |  |  |  |  |  |  |  |  |
| 1.5.9 Termination of employment costs                     |  |  |  |  |  |  |  |  |  |  |  |
| 1.6.1 School Development Grant - Non-Devolved             |  |  |  |  |  |  |  |  |  |  |  |
| 1.6.2 Other Standards Fund Allocation - Non-Devolved      |  |  |  |  |  |  |  |  |  |  |  |
| 1.6.3 Other Specific Grants                               |  |  |  |  |  |  |  |  |  |  |  |
| 1.6.4 Performance Related Grant                           |  |  |  |  |  |  |  |  |  |  |  |
| 1.7.1 Capital Expenditure from Revenue (CERA) (Schools)   |  |  |  |  |  |  |  |  |  |  |  |
| 1.7.2 Prudential borrowing costs                          |  |  |  |  |  |  |  |  |  |  |  |
| 1.8.1 TOTAL SCHOOLS BUDGET                                |  |  |  |  |  |  |  |  |  |  |  |

|  | Nursery<br>(a) | Primary<br>(b) | Secondary<br>(c) | Special<br>(d) | Cross<br>(e) | Income<br>(f) | Net<br>(g) |
|--|----------------|----------------|------------------|----------------|--------------|---------------|------------|
|  |                |                |                  |                |              |               |            |
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- 1.4.1 School meals - nursery, primary and special schools
- 1.4.2 Free school meals - eligibility
- 1.4.3 Milk
- 1.4.4 School kitchens - repair and maintenance
- 1.5.1 Insurance
- 1.5.2 Museum and Library Services
- 1.5.3 School admissions
- 1.5.4 Licences/Abolitions
- 1.5.5 Miscellaneous (not more than 0.1% total of net SB)
- 1.5.6 Servicing of schools fountains
- 1.5.7 Staff costs - supply cover (not sickness)
- 1.5.8 Supply cover - long term sickness
- 1.5.9 Termination of employment costs
- 1.6.1 School Development Grant - Non-Devolved
- 1.6.2 Other Standards Fund Allocation - Non-Devolved
- 1.6.3 Other Specific Grants
- 1.6.4 Performance Related Grant
- 1.7.1 Capital Expenditure from Revenue (CERA) (Schools)
- 1.7.2 Prudential borrowing costs
- 1.8.1 TOTAL SCHOOLS BUDGET

**2 OTHER EDUCATION AND COMMUNITY BUDGET**

**SPECIAL EDUCATION**

- 2.0.1 Educational Psychology Service
- 2.0.2 SEN administration, assessment and co-ordination
- 2.0.3 Therapies and other health related services
- 2.0.4 Project partnership, guidance and information
- 2.0.5 Monitoring of SEN provision
- 2.0.6 Total Special Education

**2.1.9 Total Learner Support**

**ACCESS**

- 2.1.1 Excluded pupils
- 2.1.2 Pupil support
- 2.1.3 Home to school transport; SEN transport expenditure
- 2.1.4 Home to school transport; other home to school transport expenditure
- 2.1.5 Home to college transport; SEN transport expenditure
- 2.1.6 Home to college transport; other home to college transport expenditure
- 2.1.7 Education Welfare Service
- 2.1.8 School improvement
- 2.1.9 Total Learner Support
- 2.2.1 Asset management - education
- 2.2.2 Supply of school places
- 2.2.3 Music services (not Standards Fund supported)
- 2.2.4 Visual and performing arts (other than music)
- 2.3.1 Outdoor Education including Environmental and Field Studies (not sports)
- 2.3.2 Total Access

**3 YOUTH AND COMMUNITY**

|       |   |  |  |
|-------|---|--|--|
| 3.0.1 | Youth Service   |  |  |
| 3.0.2 | Adult and Community Learning                                |  |  |
| 3.0.3 | Connections   |  |  |
| 3.0.4 | Discretionary Awards  |  |  |
| 3.0.5 | Student Support under new Arrangements and Mandatory Awards |  |  |
| 3.0.6 | Capital Expenditure from Revenue (CERA) (Youth & Community) |  |  |
| 3.0.7 | Total Youth and Community                                   |  |  |

**6 Local Authority Education Functions**

|       |   |  |  |
|-------|---|--|--|
| 6.0.1 | Statutory/Regulatory Duties   |  |  |
| 6.0.2 | Premature retirement costs / Redundancy costs                         |  |  |
| 6.0.3 | Exiting Early Retirement Costs (commitments entered into by 31/03/09) |  |  |
| 6.0.4 | Residual pension liability (9 FE Carers Service, etc.)                |  |  |
| 6.0.5 | Joint use arrangements  |  |  |
| 6.0.6 | Insurance   |  |  |
| 6.0.7 | Monitoring national curriculum assessment                             |  |  |
| 6.0.8 | Total Local Authority Education Functions                             |  |  |

**SPECIFIC GRANTS AND SPECIFIC FORMULA GRANTS**

|       |  |  |  |
|-------|--|--|--|
| 6.1.1 | School Development Grant - non-involved  |  |  |
| 6.1.2 | Other Specifics Fund Allocation - non-devolved   |  |  |
| 6.1.3 | Other Specifics Grant  |  |  |
| 6.1.4 | Total Specific Grants  |  |  |
| 6.2.1 | Capital Expenditure from Revenue (CERA) (LA Education Functions)   |  |  |
| 7.1.1 | Total Schools Budget, Special Education, Learner Support, Access and Youth and Community Budget (including CERA) (Lines 1.8.1 + 2.0.6 + 2.1.9 + 2.3.2 + 3.0.7) |  |  |
| 7.1.3 | Total LA Education Functions Budget (including CERA) plus (Lines 6.0.8 + 6.1.4 + 6.2.1)  |  |  |
| 8     | Total Schools Budget and Local Authority Education Functions Budget (lines 7.1.1 + 7.1.3)  |  |  |
| 9     | Capital Expenditure (excl.CERA)  |  |  |

**MEMORANDUM ITEMS**

|       |  |  |  |
|-------|--|--|--|
| 10    | Expenditure covered by LSC Grant - Include below the part of the expenditure recorded in individual lines in the Schools budget that is supported by the Learning and Skills Council |  |  |
| 10a.1 | SIXTH FORM - Allocation from LSC for 16+ funding for secondary schools (included in expenditure 1.0.1 column (c))  |  |  |
| 10a.2 | SIXTH FORM - Allocation from LSC for 16+ funding for special schools (included in expenditure 1.0.1 column (d))  |  |  |
| 10b.1 | Sixth form element included at 1.2.1 above for pupils with and without statements  |  |  |
| 10b.2 | Sixth form element included at 1.2.2 above for pupils with SEN, provision not included in line 1.2.1   |  |  |
| 10b.3 | Sixth form element included at 1.2.4 above for pupils at independent special schools and abroad  |  |  |
| 10b.4 | Sixth form element included at 1.2.6 above for pupils at independent schools (pupils without SEN)  |  |  |
| 10c.1 | LSC Threshold and Performance Pay Costs (included in expenditure at 1.0.1 columns e and d)   |  |  |
| 10c.2 | LSC Threshold and Performance Pay Costs (included in expenditure at 1.0.1 columns e and d)   |  |  |

Children, Schools and Families Financial Data Collection

BUDGET - TABLE 1: FUNDING PERIOD 3 - 2010-11

Table 1 - Local Authority Information

| YEAR    | Local Education Authority Name | Local Education Authority Number | E-Mail Address  |
|---------|--------------------------------|----------------------------------|-----------------|
| 2010-11 |                                |                                  |                 |
| CONTACT | TEL                            | Version No                       | Completion Date |

|  | Nursery (a) | Primary (b) | Secondary (c) | Special (d) | Gross (e) | Income (f) | Net (g) |
|--|-------------|-------------|---------------|-------------|-----------|------------|---------|
| <b>1 SCHOOLS BUDGET</b>  |             |             |               |             |           |            |         |
| 1.0.1 Individual Schools Budget  |             |             |               |             |           |            |         |
| 1.0.2 School Standards Grant - Maintained Schools  |             |             |               |             |           |            |         |
| 1.0.3 School Standards Grant - Pupil Referral Units  |             |             |               |             |           |            |         |
| 1.0.4 School Standards Grant (Personalisation) - Maintained Schools                            |             |             |               |             |           |            |         |
| 1.0.5 School Standards Grant (Personalisation) - Pupil Referral Units                          |             |             |               |             |           |            |         |
| 1.0.6 School Development Grant   |             |             |               |             |           |            |         |
| 1.0.7 Other Standards Fund Allocation - Devolved   |             |             |               |             |           |            |         |
| 1.0.8 Threshold and Performance Pay (Devolved)   |             |             |               |             |           |            |         |
| 1.0.9 Expenditure for Education of Children under 5s in Private/voluntary/independent settings |             |             |               |             |           |            |         |
| 1.1.1 Support for schools in financial difficulty  |             |             |               |             |           |            |         |
| 1.1.2 School-specific contingencies  |             |             |               |             |           |            |         |
| 1.2.1 Provision for pupils with SEN (including assigned resources)                             |             |             |               |             |           |            |         |
| 1.2.2 Provision for pupils with SEN, provision not included in line 1.2.1                      |             |             |               |             |           |            |         |
| 1.2.3 Support for inclusion  |             |             |               |             |           |            |         |
| 1.2.4 Fees for pupils at independent special schools & abroad                                  |             |             |               |             |           |            |         |
| 1.2.5 SEN Transport  |             |             |               |             |           |            |         |
| 1.2.6 Fees to independent schools for pupils without SEN                                       |             |             |               |             |           |            |         |
| 1.2.7 Inter-authority recruitment  |             |             |               |             |           |            |         |
| 1.2.8 Contribution to combined budgets   |             |             |               |             |           |            |         |
| 1.3.1 Pupil Referral Units   |             |             |               |             |           |            |         |
| 1.3.2 Behaviour Support Services   |             |             |               |             |           |            |         |
| 1.3.3 Education out of school  |             |             |               |             |           |            |         |
| 1.3.4 14 - 16 More practical learning options  |             |             |               |             |           |            |         |
| 1.3.5 Central expenditure on education of children under 5s                                    |             |             |               |             |           |            |         |

|       |   |  |  |  |  |
|-------|---|--|--|--|--|
| 1.4.1 | School meals - nursery, primary and special schools |  |  |  |  |
| 1.4.2 | Free school meals - eligibility                     |  |  |  |  |
| 1.4.3 | Milk  |  |  |  |  |
| 1.4.4 | School kitchens - repair and maintenance            |  |  |  |  |
| 1.5.1 | Insurance   |  |  |  |  |
| 1.5.2 | Museum and Library Services                         |  |  |  |  |
| 1.5.3 | School admissions                                   |  |  |  |  |
| 1.5.4 | Licences/Subscriptions                              |  |  |  |  |
| 1.5.5 | Miscellaneous (not more than 0.1% total of net SB)  |  |  |  |  |
| 1.5.6 | Service of school forums                            |  |  |  |  |
| 1.5.7 | Staff costs - supply cover (not address)            |  |  |  |  |
| 1.5.8 | Supply cover - long term sickness                   |  |  |  |  |
| 1.5.9 | Termination of employment costs                     |  |  |  |  |
| 1.6.1 | School Development Grant - Non-Devolved             |  |  |  |  |
| 1.6.2 | Other Standards Fund Allocation - Non-Devolved      |  |  |  |  |
| 1.6.3 | Other Specific Grants                               |  |  |  |  |
| 1.6.4 | Performance Reward Grant                            |  |  |  |  |
| 1.7.1 | Capital Expenditure from Revenue (CERA) (Schools)   |  |  |  |  |
| 1.7.2 | Prudential borrowing costs                          |  |  |  |  |
| 1.8.1 | <b>TOTAL SCHOOLS BUDGET</b>                         |  |  |  |  |

**9 Capital Expenditure (exc.CERA)**

**MEMORANDUM ITEMS**

10 Expenditure covered by LSC Grant - includes below the part of the expenditure recorded in individual lines in the Schools budget that is supported by the Learning and Skills Council.

10a.1 SIXTH FORM - Allocation from LSC for 16+ funding for secondary schools (included in expenditure 1.0.1 column (c))

10a.2 SIXTH FORM - Allocation from LSC for 16+ funding for special schools (included in expenditure 1.1.1 column (d))

10b.1 Such form element included at 1.2.1 above for pupils with and without statements.

10b.2 Such form element included at 1.2.2 above for pupils with SEN, provision not included in line 1.2.1

10b.3 Such form element included at 1.2.4 above for pupils at independent special schools and academies

10b.4 Such form element included at 1.2.6 above for pupils at independent schools (pupils without SEN)

10c.1 LSC Threshold and Performance Pay Costs (included in expenditure at 1.0.1 columns c and d)

10c.2 LSC Threshold and Performance Pay Costs (included in expenditure at 1.0.1 columns e and f)



**CENTRAL EXPENDITURE LIMIT: FUNDING PERIODS 2 & 3 - (2009-10 TO 2010-11)**

**Children, Schools and Families Data Collection**

| Table 1 - Local Authority Information |         |                                |                                  |                |
|---------------------------------------|---------|--------------------------------|----------------------------------|----------------|
| YEAR                                  | 2009-10 | Local Education Authority Name | Local Education Authority Number | E-Mail Address |
| CONTACT                               | TEL     | Version No                     | Completion Date                  |                |

| Central Expenditure Limit = (A+B)/(C+D)   | must be greater than or equal to |             | Schools Budget =<br>DSG +<br>LSC +<br>LA Contributions | SECTION 52 Reference  |
|---|----------------------------------|-------------|--|---|
|   | E/F                              |             |  |   |
|   | 2009-10                          | 2010-11     |  |   |
| Individual Schools Budget (one 16)<br>Post 16 funding from the LSC (delegated to schools)<br>Local Authority Contribution (delegated to schools)<br>DSG carry forward (delegated to schools) (may be positive or negative)  | i)<br>ii)<br>iii)<br>iv)         |             |  | Table 1 line 1.0.1, less iii), iii) & iv) below<br>Table 2 line (D5), column 5<br>SBS table line 6 (less vi) below<br>SBS table line 3c (less vi) below |
| Sum of i) ii) and iv)<br>Private, Voluntary and Independent Providers   | A<br>B<br>A + B                  | 0<br>0<br>0 | 0<br>0<br>0  | Table 1 line 1.0.9  |
| Other centrally retained budgets (excluding those specified above)<br>Local Authority Contribution (as part of the centrally retained budget)<br>DSG carry forward (not delegated to schools) (may be positive or negative) | v)<br>vi)<br>vii)                |             |  | Table 1 lines 1.1.1 to 1.5.9 inclusive + 1.7.1 + 1.7.2<br>SBS table line 8 (less iii) above,<br>SBS table line 3c (less vi) above                       |
| <b>TOTAL PROPOSED SCHOOLS BUDGET</b>  | <b>E</b>                         | 0           | 0  |   |
| Individual Schools Budget (one 16)<br>Post 16 funding from the LSC (delegated to schools)<br>Local Authority Contribution (delegated to schools)<br>DSG carry forward (delegated to schools) (may be positive or negative)  | viii)<br>ix)<br>x)<br>xi)        |             |  | Table 1 line 1.0.1, less ix), x) & xi) below<br>Table 2 line (D5), column 5<br>SBS table line 6 (less xii) below<br>SBS table line 3c (less vi) below   |
| Sum of viii) ix) and xi)<br>Private, Voluntary and Independent Providers  | C<br>D<br>C + D                  | 0<br>0<br>0 | 0<br>0<br>0  | Table 1 line 1.0.9  |
| Other centrally retained budgets (excluding those specified above)<br>Local Authority Contribution (as part of the centrally retained budget)<br>DSG carry forward (not delegated to schools) (may be positive or negative) | xii)<br>xiii)<br>xiv)            |             |  | Table 1 lines 1.1.1 to 1.5.9 inclusive + 1.7.1 + 1.7.2<br>SBS table line 8 (less xi) above,<br>SBS table line 3c (less xi) above                        |
| <b>TOTAL SCHOOLS BUDGET</b>   | <b>F</b>                         | 0           | 0  |   |
| Percentage Increase in ISB and PVI (A+B)/(C+D) / (C+D)  |                                  | 0.0%        | 0.0%   |   |
| Percentage Increase in Schools Budget (E/F)/F   |                                  | 0.0%        | 0.0%   |   |
| <b>Has the Central Expenditure Limit been breached?</b>   | No                               | No          | No   |   |
| <b>Where a breach is shown, has this been agreed with the Schools Forum</b>   |                                  |             |  |   |
| <b>Date and Minute of meeting</b>   |                                  |             |  |   |

**EARLY YEARS : FUNDING PERIOD - 2009-10**

**Children, Schools and Families Financial Data Collection** Annex to Table 1: Early Years Expenditure

| YEAR    | 2009-10 | Local Education Authority Name | Local Education Authority Number | E-Mail Address  | E-Mail Address  |
|---------|---------|--------------------------------|----------------------------------|-----------------|-----------------|
| CONTACT | TEL     |                                | Version No                       | Completion Date | Completion Date |

**EARLY YEARS EXPENDITURE ON THE FREE ENTITLEMENT**

**Expenditure on the free entitlement delegated to early years providers**

- EY1.1 Maintained nursery schools
- EY1.2 Maintained nursery classes in primary schools
- EY1.3 Private, Voluntary and Independent Providers
- EY1.4 Total 2008-09 expenditure on the free entitlement delegated to early years providers

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**Method of counting children for funding the free entitlement**

- EY2.1 Maintained nursery schools
- EY2.2 Maintained nursery classes in primary schools
- EY2.3 Private, Voluntary and Independent Providers

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**Hourly rate at which the Local Authority funds providers for the free entitlement**

- EY3.1 Maintained nursery schools
- EY3.2 Maintained nursery classes in primary schools
- EY3.31 Private, Voluntary and Independent Providers (average rate)
- EY3.32 Private, Voluntary and Independent Providers (minimum rate)
- EY3.33 Private, Voluntary and Independent Providers (maximum rate)

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**Central Expenditure in respect of the free entitlement to early years**

- EY4.1 Maintained nursery schools
- EY4.2 Maintained nursery classes in primary schools
- EY4.3 Private, Voluntary and Independent Providers
- EY4.4 Total 2008-09 central expenditure in respect of early years education

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**January 2008 pupil count: children accessing the free entitlement (PTE)**

- EY5.1 Maintained nursery schools
- EY5.2 Maintained nursery classes in primary schools
- EY5.3 Private, Voluntary and Independent Providers
- EY5.4 Total 2008-09 children accessing the free entitlement (PTE)

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**YOUTH SERVICE ANNEX: FUNDING PERIOD 2 - 2009-10**

**Children, Schools and Families Financial Data Collection      Annex to Table 1: Youth Service**

|                |            |                                  |   |                       |
|----------------|------------|----------------------------------|---|-----------------------|
| <b>YEAR</b>    | 2009-10    | <b>Local Education Authority</b> | <b>Local Education Authority Number</b> | <b>E-Mail Address</b> |
| <b>CONTACT</b> | <b>TEL</b> | <b>Version No</b>                | <b>Completion Date</b>                  |                       |

| <b>YOUTH SERVICE (NET)</b>                                | <b>LEA Direct Spend</b> | <b>Contracted with Voluntary Organisations</b> | <b>Contracted with Other Organisations</b> | <b>Voluntary Organisations Grant Aid</b> | <b>TOTAL</b> |
|---|-------------------------|--|--|--|--------------|
| <b>Management</b>   |                         |  |  |  |              |
| Full Time   |                         |  |  |  |              |
| Part Time   |                         |  |  |  |              |
| <b>Youth Workers</b>                                      |                         |  |  |  |              |
| Full Time   |                         |  |  |  |              |
| Part Time   |                         |  |  |  |              |
| <b>Support Staff</b>                                      |                         |  |  |  |              |
| Full Time   |                         |  |  |  |              |
| Part Time   |                         |  |  |  |              |
| <b>Staff Training</b>                                     |                         |  |  |  |              |
| <b>Non-Staff Costs</b>                                    |                         |  |  |  |              |
| <b>Total Running Costs (Table 1, Line 3.0.1, Net)</b>     |                         |  |  |  |              |
| Capital (Table 1, Line 3.0.6, Net, Youth Service element) |                         |  |  |  |              |
| <b>YOUTH SERVICE TOTAL</b>                                |                         |  |  |  |              |



| Special schools                    |              | (3) Total place led funding £ | (4) Total Pupil Led Funding £ | (6) Total AEN - Learning needs associated with EAL £ | (10) Total AEN - Social Need £ | (11) Total Site-specific factors (including pupil-led) £ | (12) Total School-specific factors (including pupil-led) £ | (13) Total budget adjustments £ | (14) Minimum funding guarantee £ | (15) TOTAL BUDGET SHARE |   |                  |
|------------------------------------|--------------|-------------------------------|-------------------------------|--|--------------------------------|--|--|---------------------------------|----------------------------------|-------------------------|---|------------------|
| (1) School name                    | (2) DCSF No. |                               |                               |  |                                |  |  |                                 |                                  | £                       | (16) January 2009 Pupil Count (FTE registered pupils) | (17) £ per pupil |
|                                    |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
|                                    |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
| (34) Total/average Special Schools |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |
| (35) Total All Schools             |              |                               |                               |  |                                |  |  |                                 |                                  |                         |   |                  |

**Memorandum items**

- (36) Academy Funding for SEN pupils that would normally be delegated
- (37) Total ISB
- (38) Academy Specific Grants
- (39) Unallocated Specific Grants
- (40) Total Specific Grants
- (41) Unallocated Threshold and Performance Pay
- (42) Total Threshold and Performance Pay
- (43) Unallocated funding to support schools in financial difficulties
- (44) Total funding for schools in financial difficulty



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| Memorandum items            |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|-----------------------------|---|--|--|---|--------------------------------------|------------------------------------|--|--------------------------------|-------------------------------|-----------------------------|--|
| Grants                      |   |  |  |   |                                      |                                    |  | Other                          |                               |                             |  |
| (19) SCHOOL STANDARDS GRANT | (20) SCHOOL STANDARDS GRANT (PERSONALISATION) | (21) SCHOOL DEVELOPMENT GRANT - MAIN 2008-09 | (22) SCHOOL DEVELOPMENT GRANT - MAIN 2009-10 | (23) SCHOOL DEVELOPMENT GRANT - OTHER 2009-10 | (24) OTHER STANDARDS FUND ALLOCATION | (25) THRESHOLD AND PERFORMANCE PAY | (26) SUPPORT FOR SCHOOLS IN FINANCIAL DIFFICULTY | (28) LSC Pupils (January 2009) | (29) SCHOOL OPENING / CLOSING | (30) DATE OPENING / CLOSING |  |
| £                           | £   | £  | £  | £   | £                                    | £                                  | £  |                                | C OR O                        | dd mm yy                    |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |  |









**Memorandum items**

(36) Academy  
Funding for  
SEN pupils  
that would  
normally be  
delegated

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(37) Total ISB

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(38) Academy  
Specific  
Grants

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(39)  
Unallocated  
Specific  
Grants

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(40) Total  
Specific  
Grants

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(41)  
Unallocated  
Threshold and  
Performance  
Pay

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(42) Total  
Threshold and  
Performance  
Pay

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(43)  
Unallocated  
funding to  
support  
schools in  
financial  
difficulties

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(44) Total  
funding for  
schools in  
financial  
difficulty

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# PART 4

**TABLE 4: FUNDING PERIOD 2 - 2009-10**

**Children, Schools and Families Financial Data Collection**

**Table 4: Funding Factors**

|                |         |                                       |  |   |  |                        |  |
|----------------|---------|---------------------------------------|--|---|--|------------------------|--|
| <b>YEAR</b>    | 2009-10 | <b>Local Education Authority Name</b> |  | <b>Local Education Authority Number</b> |  | <b>E-Mail Address</b>  |  |
| <b>CONTACT</b> |         | <b>TEL</b>                            |  | <b>Version No</b>                       |  | <b>Completion Date</b> |  |

**(1) Nursery, Primary and Secondary Schools**

|   |
|---|
| <b>PUPIL COUNT ARRANGEMENTS (2)</b><br>Supply Method of pupil count, count dates and worked example(s) where appropriate: |
|---|

|                          |                  |                                    |   |
|--------------------------|------------------|------------------------------------|---|
| (3) Band, Range or Level | (4) Unit Value £ | (5) Total allocated through factor | (6) % of Nursery, Primary & Secondary budgets |
|--------------------------|------------------|------------------------------------|---|

| AGE-WEIGHTED FUNDING (7) |             |   | Weighting Ratios (8) |  |            |  | Pupil numbers (9) |
|--------------------------|-------------|---|----------------------|--|------------|--|-------------------|
| Key Stage                | School Year | Age group (pupils' ages as at 31 <sup>st</sup> August 2009) |                      |  |            |  |                   |
| -                        | Nursery     | 3 yr old  |                      |  | Nursery:   |  |                   |
| -                        | Nursery     | 4 yr old  |                      |  |            |  |                   |
| -                        | Reception   |   |                      |  |            |  |                   |
| 1                        | 1           | 5   |                      |  |            |  |                   |
|                          | 2           | 6   |                      |  |            |  |                   |
|                          | 3           | 7   |                      |  |            |  |                   |
| 2                        | 4           | 8   |                      |  |            |  |                   |
|                          | 5           | 9   |                      |  |            |  |                   |
|                          | 6           | 10  |                      |  |            |  |                   |
|                          | 7           | 11  |                      |  |            |  |                   |
| 3                        | 8           | 12  |                      |  | Primary:   |  |                   |
|                          | 9           | 13  |                      |  |            |  |                   |
| 4                        | 10          | 14  |                      |  | Secondary: |  |                   |
|                          | 11          | 15  |                      |  |            |  |                   |
| Re-takes (Year 12+)      |             |   |                      |  |            |  |                   |
|                          |             |   |                      |  | Secondary: |  |                   |

|   |
|---|
| Method and worked example(s) where appropriate: |
|---|

PRE-SCHOOL Pupil-Led Funding (Nursery Classes) (10)

Nursery 3 year olds    
 Nursery 4 year olds

Nursery:

Primary:

Method and worked example(s) where appropriate:

Pre-School Place-Led Funding (Nursery Classes) (11)

Nursery 3 year olds    
 Nursery 4 year olds

Nursery:

Primary:

Method and worked example(s) where appropriate:

KS 1 ALTERNATIVE FUNDING ROUTES FROM 1/9/03 (i.e. not by AWPU) (12)

Class-based

Nursery:

Class-based

Primary:

Ghost funding

Nursery:

Ghost funding

Primary:

Method and worked example(s) where appropriate:

Difference in funding for pupils educated additionally at F.E colleges, work based learning providers or other providers of more practical learning options

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Method and worked example(s) where appropriate:

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FUNDING OF SIXTH FORM PUPILS FROM LEA FUNDS (13)

"Top-up"

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Secondary:

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Method and worked example(s) where appropriate:

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OTHER PLACE-LED FUNDING TREATED AS PUPIL-LED such as in boarding units and hostels (14)

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| Nursery:   |  |
| Primary:   |  |
| Secondary: |  |

Method and worked example(s) where appropriate:

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LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS (15)

FTE Pupils (LSC Funded)



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Secondary:

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Method and worked example(s) where appropriate:

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AEN - Learning needs associated with EAL (16)

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|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (pupil-led) (17)

SEN - pupils with or without statements (pupil-led) Named Pupil Individually Assigned Resources (18)

Nursery

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|  |  | Nursery: |  |

Primary

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|  |  | Primary: |  |

Secondary

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|  |  | Secondary: |  |

SEN - pupils with or without statements (pupil-led) Other (19)

Nursery

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Nursery:

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Primary

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Primary:

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Secondary

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Secondary:

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|---|
| Method and worked example(s) where appropriate: |
|   |

SEN - pupils with or without statements (place-led treated as pupil-led) Named Pupil Individually Assigned Resources (20)

Nursery

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Nursery:

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Primary

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Primary:

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Secondary

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Secondary:

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SEN - pupils with or without statements (place-led treated as pupil-led) Other (21)

Nursery

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Nursery:

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Primary

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Primary:

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Secondary

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Secondary:

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| Method and worked example(s) where appropriate: |
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AEN - Identified Special Educational Needs (non pupil-led) (22)

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Nursery:

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Primary:

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Secondary:

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| Method and worked example(s) where appropriate: |
|   |

AEN - Other Learning Needs (23)

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|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Social Needs (24)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

Site - Specific Factors (Including pupil-led) (25)

Nursery

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Nursery:

Primary

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Primary:

Secondary

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Secondary:

Method and worked example(s) where appropriate:

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School - Specific Factors (Including pupil-led) (26)

Nursery

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Nursery:

Primary

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Primary:

Secondary

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Secondary:

Method and worked example(s) where appropriate:

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**BUDGET ADJUSTMENTS (27)**

TRANSITIONAL PROVISION (28)

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

ABATEMENT OF Secondary (11-16) FUNDING arising from operation of the Local Education Authority's formula (29)

|            |
|------------|
| Secondary: |
|            |

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (30)

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

**TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (31)**

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

**SPECIAL SCHOOLS (32)**

PLACE-LED FUNDING (33)

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Special

Method and worked example(s) where appropriate:

PUPIL-LED FUNDING (34)

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Special

Method and worked example(s) where appropriate:

AEN - LEARNING NEEDS ASSOCIATED WITH EAL (35)

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Special

Method and worked example(s) where appropriate:

AEN - SOCIAL NEED (36)

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|  |  | Special |
|  |  |         |
|  |  |         |

Method and worked example(s) where appropriate:

SITE - SPECIFIC FACTORS (Including pupil-led) (37)

|  |  |         |
|--|--|---------|
|  |  | Special |
|  |  |         |
|  |  |         |

Method and worked example(s) where appropriate:

SCHOOL - SPECIFIC FACTORS (Including pupil-led) (38)

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|  |  | Special |
|  |  |         |
|  |  |         |

Method and worked example(s) where appropriate:



BUDGET ADJUSTMENTS e.g transitional provision (39)

Special

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (40)

Special

Method and worked example(s) where appropriate:

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (41)

Special

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (42)

All Schools

**TABLE 4: FUNDING PERIOD 3 2010-11**

**Children, Schools and Families Financial Data Collection**

**Table 4: Funding Factors**

|                |         |                                       |  |   |  |                        |  |
|----------------|---------|---------------------------------------|--|---|--|------------------------|--|
| <b>YEAR</b>    | 2010-11 | <b>Local Education Authority Name</b> |  | <b>Local Education Authority Number</b> |  | <b>E-Mail Address</b>  |  |
| <b>CONTACT</b> |         | <b>TEL</b>                            |  | <b>Version No</b>                       |  | <b>Completion Date</b> |  |

**(1) Nursery, Primary and Secondary Schools**

|  |
|--|
| <b>PUPIL COUNT ARRANGEMENTS (2)</b>  |
| Supply Method of pupil count, count dates and worked example(s) where appropriate: |

|                          |                  |                                    |   |
|--------------------------|------------------|------------------------------------|---|
| (3) Band, Range or Level | (4) Unit Value £ | (5) Total allocated through factor | (6) % of Nursery, Primary & Secondary budgets |
|--------------------------|------------------|------------------------------------|---|

| AGE-WEIGHTED FUNDING (7) |             |   | Weighting Ratios (8) |  |            |  | Pupil numbers (9) |
|--------------------------|-------------|---|----------------------|--|------------|--|-------------------|
| Key Stage                | School Year | Age group (pupils' ages as at 31 <sup>st</sup> August 2010) |                      |  |            |  |                   |
| -                        | Nursery     | 3 yr old  |                      |  | Nursery:   |  |                   |
| -                        | Nursery     | 4 yr old  |                      |  |            |  |                   |
| -                        | Reception   |   |                      |  |            |  |                   |
| 1                        | 1           | 5   |                      |  |            |  |                   |
|                          | 2           | 6   |                      |  |            |  |                   |
|                          | 3           | 7   |                      |  |            |  |                   |
| 2                        | 4           | 8   |                      |  |            |  |                   |
|                          | 5           | 9   |                      |  |            |  |                   |
|                          | 6           | 10  |                      |  |            |  |                   |
|                          | 7           | 11  |                      |  |            |  |                   |
| 3                        | 8           | 12  |                      |  | Primary:   |  |                   |
|                          | 9           | 13  |                      |  | Secondary: |  |                   |
| 4                        | 10          | 14  |                      |  |            |  |                   |
|                          | 11          | 15  |                      |  |            |  |                   |
| Re-takes (Year 12+)      |             |   |                      |  |            |  |                   |
|                          |             |   |                      |  | Secondary: |  |                   |

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |

PRE-SCHOOL Pupil-Led Funding (Nursery Classes) (10)

Nursery 3 year olds    
 Nursery 4 year olds

Nursery:

Primary:

Method and worked example(s) where appropriate:

Pre-School Place-Led Funding (Nursery Classes) (11)

Nursery 3 year olds    
 Nursery 4 year olds

Nursery:

Primary:

Method and worked example(s) where appropriate:

KS 1 ALTERNATIVE FUNDING ROUTES FROM 1/9/03 (i.e. not by AWPU) (12)

Class-based

Nursery:

Class-based

Primary:

Ghost funding

Nursery:

Ghost funding

Primary:

Method and worked example(s) where appropriate:

Difference in funding for pupils educated additionally at F.E colleges, work based learning providers or other providers of more practical learning options

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Method and worked example(s) where appropriate:

FUNDING OF SIXTH FORM PUPILS FROM LEA FUNDS (13)

"Top-up"

Secondary:

Method and worked example(s) where appropriate:

OTHER PLACE-LED FUNDING TREATED AS PUPIL-LED such as in boarding units and hostels (14)

|  |  |            |                      |
|--|--|------------|----------------------|
|  |  | Nursery:   | <input type="text"/> |
|  |  | Primary:   | <input type="text"/> |
|  |  | Secondary: | <input type="text"/> |
|  |  |            | <input type="text"/> |

Method and worked example(s) where appropriate:

LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS (15)

FTE Pupils (LSC Funded) ██████████

Secondary:

Method and worked example(s) where appropriate:

AEN - Learning needs associated with EAL (16)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (pupil-led) (17)

SEN - pupils with or without statements (pupil-led) Named Pupil Individually Assigned Resources (18)

Nursery

|  |  |          |  |
|--|--|----------|--|
|  |  |          |  |
|  |  |          |  |
|  |  |          |  |
|  |  |          |  |
|  |  | Nursery: |  |

Primary

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|  |  | Primary: |  |

Secondary

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|  |  |            |  |
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|  |  | Secondary: |  |

SEN - pupils with or without statements (pupil-led) Other (19)

Nursery

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Nursery:

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Secondary

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Secondary:

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| Method and worked example(s) where appropriate: |
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SEN - pupils with or without statements (place-led treated as pupil-led) Named Pupil Individually Assigned Resources (20)

Nursery

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Nursery:

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Secondary

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Secondary:

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SEN - pupils with or without statements (place-led treated as pupil-led) Other (21)

Nursery

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Nursery:

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Secondary

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Secondary:

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| Method and worked example(s) where appropriate: |
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AEN - Identified Special Educational Needs (non pupil-led) (22)

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Nursery:

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Primary:

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Secondary:

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| Method and worked example(s) where appropriate: |
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AEN - Other Learning Needs (23)

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|  | Nursery:   |  |
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|  | Primary:   |  |
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|  | Secondary: |  |
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Method and worked example(s) where appropriate:

AEN - Social Needs (24)

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|  | Nursery:   |  |
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|  | Primary:   |  |
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|  | Secondary: |  |
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Method and worked example(s) where appropriate:



Site - Specific Factors (Including pupil-led) (25)

Nursery

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Primary

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Secondary

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|  |  | Secondary: |

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| Method and worked example(s) where appropriate: |
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School - Specific Factors (Including pupil-led) (26)

Nursery

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|  |  | Nursery: |

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|  |  | Primary: |

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|  |  | Secondary: |

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| Method and worked example(s) where appropriate: |
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**BUDGET ADJUSTMENTS (27)**

TRANSITIONAL PROVISION (28)

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
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Method and worked example(s) where appropriate:

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ABATEMENT OF Secondary (11-16) FUNDING arising from operation of the Local Education Authority's formula (29)

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|------------|
| Secondary: |
|            |

Method and worked example(s) where appropriate:

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MINIMUM FUNDING GUARANTEE (30)

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

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**TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (31)**

|            |
|------------|
| Nursery:   |
| Primary:   |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

**SPECIAL SCHOOLS (32)**

**PLACE-LED FUNDING (33)**

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| Special |
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Method and worked example(s) where appropriate:

**PUPIL-LED FUNDING (34)**

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| Special |
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Method and worked example(s) where appropriate:

AEN - LEARNING NEEDS ASSOCIATED WITH EAL (35)

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|  |  | Special |
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Method and worked example(s) where appropriate:

AEN - SOCIAL NEED (36)

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|--|--|---------|
|  |  | Special |
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Method and worked example(s) where appropriate:

SITE - SPECIFIC FACTORS (Including pupil-led) (37)

|  |  |         |
|--|--|---------|
|  |  | Special |
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Method and worked example(s) where appropriate:

SCHOOL - SPECIFIC FACTORS (Including pupil-led) (38)

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|  |  | Special |
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Method and worked example(s) where appropriate:

BUDGET ADJUSTMENTS e.g transitional provision (39)

Special

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (40)

Special

Method and worked example(s) where appropriate:

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (41)

Special

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (42)

All Schools

SCHEDULE 3

Regulation 4(5) – (6)

FORM OF THE THIRD BUDGET STATEMENT

PART 1

SCHOOL BUDGET SUMMARY TABLE FUNDING PERIOD 3: 2010-2011

| Children, Schools and Families Financial Data Collection |                                |                                  |                 |                                  | SCHOOL BUDGET SUMMARY TABLE |                  |
|--|--------------------------------|----------------------------------|-----------------|----------------------------------|-----------------------------|------------------|
| YEAR   | Local Education Authority Name | Local Education Authority Number | E-Mail Address: | Local Education Authority Number | Version No                  | Completion Date: |
| 2010-2011  |                                |                                  |                 |                                  |                             |                  |
| CONTACT  |                                |                                  |                 |                                  |                             |                  |
|  | TEL.                           |                                  |                 |                                  |                             |                  |

This table provides an account of the main sources of funding available to the Local Education Authority to support their Schools Budget, including any additional funding provided 2010-11 (e)

1. Dedicated Schools Grant - Local Education Authority's estimate of pupil numbers
2. Dedicated Schools Grant - Guaranteed Unit of Funding Per Pupil
- 3.a Estimated Dedicated Schools Grant
- 3.b Academy: Estimated Recoupment from Dedicated Schools Grant
- 3.c Dedicated Schools Grant, amount brought forward
- 4 School Standards Grants - including Personalisation
- 5 School Development Grant
- 6 Other Standards Fund Grants
- 7 LSC funding
- 8 Local Education Authority additional contribution
- 9 Total funding supporting the Schools Budget (lines 3 to 8)

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| <b>SBS Table Notes</b><br>Note that the information you provide in this section will be taken into account when returned to DCSF. |
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## PART 2

**Children, Schools and Families Financial Data Collection**  
**BUDGET - TABLE 1: FUNDING PERIOD 3 - 2010-11**

| Table 1 - Local Authority Information |                                |                                  |                |                 |
|---------------------------------------|--------------------------------|----------------------------------|----------------|-----------------|
| YEAR                                  | Local Education Authority Name | Local Education Authority Number | E-Mail Address | Completion Date |
| CONTACT                               | TEL                            | Version No                       |                |                 |
|                                       | 2010-11                        |                                  |                |                 |

**1 SCHOOLS BUDGET**

|   | Nursery (a) | Primary (b) | Secondary (c) | Special (d) | Gross (e) | Income (f) | Net (g) |
|---|-------------|-------------|---------------|-------------|-----------|------------|---------|
| 10.1 Individual Schools Budget  |             |             |               |             |           |            |         |
| 10.2 School Standards Grant - Maintained Schools  |             |             |               |             |           |            |         |
| 10.3 School Standards Grant - Pupil Referral Units  |             |             |               |             |           |            |         |
| 10.4 School Standards Grant (Personalisation) - Maintained Schools                            |             |             |               |             |           |            |         |
| 10.5 School Standards Grant (Personalisation) - Pupil Referral Units                          |             |             |               |             |           |            |         |
| 10.6 School Development Grant   |             |             |               |             |           |            |         |
| 10.7 Other Standards Fund Allocation - Devolved   |             |             |               |             |           |            |         |
| 10.8 Threshold and Performance Pay (Devolved)   |             |             |               |             |           |            |         |
| 10.9 Expenditure for Education of Children under 5s in Private/voluntary/independent settings |             |             |               |             |           |            |         |
| 1.1.1 Support for schools in financial difficulty   |             |             |               |             |           |            |         |
| 1.1.2 School specific contingencies   |             |             |               |             |           |            |         |
| 1.2.1 Provision for pupils with SEN (including assigned resources)                            |             |             |               |             |           |            |         |
| 1.2.2 Provision for pupils with SEN, provision not included in line 1.2.1                     |             |             |               |             |           |            |         |
| 1.2.3 Support for inclusion   |             |             |               |             |           |            |         |
| 1.2.4 Fees for pupils at independent special schools & abroad                                 |             |             |               |             |           |            |         |
| 1.2.5 SEN transport   |             |             |               |             |           |            |         |
| 1.2.6 Fees to independent schools for pupils without SEN                                      |             |             |               |             |           |            |         |
| 1.2.7 Inter-authority recruitment   |             |             |               |             |           |            |         |
| 1.2.8 Contribution to combined budgets  |             |             |               |             |           |            |         |
| 1.3.1 Pupil Referral Units  |             |             |               |             |           |            |         |
| 1.3.2 Behaviour Support Services  |             |             |               |             |           |            |         |
| 1.3.3 Education out of school   |             |             |               |             |           |            |         |
| 1.3.4.14 - 18 More practical learning options   |             |             |               |             |           |            |         |
| 1.3.5 Central expenditure on education of children under 5s                                   |             |             |               |             |           |            |         |





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**3 YOUTH AND COMMUNITY**

- 3.0.1 Youth Service
- 3.0.2 Adult and Community Learning
- 3.0.3 Concessions
- 3.0.4 Discretionary Awards
- 3.0.5 Student Support under new Arrangements and Mandatory Awards
- 3.0.6 Capital Expenditure from Revenue (CERA) (Youth & Community)
- 3.0.7 Total Youth and Community

**6 Local Authority Education Functions**

- 6.0.1 Statutory/Regulatory Duties
- 6.0.2 Premature retirement costs / Redundancy costs
- 6.0.3 Existing Early Retirement Costs commitments entered into by 31/03/09
- 6.0.4 Residual pension liability (eg FE, Careers Service, etc.)
- 6.0.5 Joint use arrangements
- 6.0.6 Insurance
- 6.0.7 Monitoring national curriculum assessment
- 6.0.8 Total Local Authority Education Functions

**SPECIFIC GRANTS AND SPECIFIC FORMULA GRANTS**

- 6.1.1 School Development Grant - non-derived
- 6.1.2 Other Standards Fund Allocation - non-derived
- 6.1.3 Other Specific Grant
- 6.1.4 Total Specific Grants

**6.2.1 Capital Expenditure from Revenue (CERA) (LA Education Functions)**

7.1.1 Total Schools Budget, Special Education, Learner Support, Access and Youth and Community Budget (including CERA) (Lines 1.8.1 + 2.0.6 + 2.1.9 + 2.3.2 + 3.0.7)

7.1.3 Total LA Education Functions Budget (including CERA) plus (Lines 6.0.8 + 6.1.4 + 6.2.1)

8 Total Schools Budget and Local Authority Education Functions Budget (lines 7.1.1 + 7.1.3)

9 Capital Expenditure (incl.CEBA)

**MEMORANDUM ITEMS**

10 Expenditure covered by LSC Grant - include below the part of the expenditure recorded in individual lines in the Schools budget that is supported by the Learning and Skills Council.

10a.1 SIXTH FORM - Allocation from LSC for 15+ funding for secondary schools (included in expenditure 1.0.1, column (c))

10a.2 SIXTH FORM - Allocation from LSC for 15+ funding for special schools (included in expenditure 1.0.1, column (d))

10b.1 Sixth form element included at 1.2.1 above for pupils with and without statements

10b.2 Sixth form element included at 1.2.2 above for pupils with SEN, provision not included in line 1.2.1

10b.3 Sixth form element included at 1.2.4 above for pupils at independent special schools and abroad

10b.4 Sixth form element included at 1.2.6 above for pupils at independent schools (pupils without SEN)

10c.1 LSC Threshold and Performance Pay Costs (included in expenditure at 1.0.1 columns c and d)

10c.2 LSC Threshold and Performance Pay Costs (included in expenditure at 1.0.1 columns c and d)

**CENTRAL EXPENDITURE LIMIT: FUNDING PERIOD 3 - (2010-11)**

**Children, Schools and Families Data Collection**

| Table 1 - Local Authority information |         |                                |                                  |                 |
|---------------------------------------|---------|--------------------------------|----------------------------------|-----------------|
| YEAR                                  | 2010-11 | Local Education Authority Name | Local Education Authority Number | E-Mail Address  |
| CONTACT                               | TEL     |                                | Version No.                      | Completion Date |

|  | 2010-11   | 2009-10   | SECTION 52 Reference |
|--|---|---|----------------------|
| <p>Central Expenditure Limit = <math>(A+B)/(C+D)</math></p> <p>must be greater than or equal to <math>E/F</math></p> <p>Schools Budget = DSG + LSC + LA Contributions</p>  |   |   |                      |
| <p>Individual Schools Budget (pre 16)</p> <p>Post 16 funding from the LSC delegated to schools</p> <p>Local Authority Contribution (delegated to schools)</p> <p>DSG carry forward (delegated to schools) (may be positive or negative)</p> <p>Sum of i) ii) iii) and iv)</p> <p>Private, Voluntary and Independent Providers</p> <p>Other centrally retained budgets (excluding those specified above)</p> <p>Local Authority Contribution (as part of the centrally retained budget)</p> <p>DSG carry forward (not delegated to schools) (may be positive or negative)</p> <p><b>TOTAL PROPOSED SCHOOLS BUDGET</b></p> | <p>i) <input type="text"/></p> <p>ii) <input type="text"/></p> <p>iii) <input type="text"/></p> <p>iv) <input type="text"/></p> <p>A <input type="text"/></p> <p>B <input type="text"/></p> <p>A + B <input type="text"/></p> <p>v) <input type="text"/></p> <p>vi) <input type="text"/></p> <p>vii) <input type="text"/></p> <p>E <input type="text"/></p> <p><b>2009-10</b></p> <p>viii) <input type="text"/></p> <p>ix) <input type="text"/></p> <p>x) <input type="text"/></p> <p>xi) <input type="text"/></p> <p>C <input type="text"/></p> <p>D <input type="text"/></p> <p>C + D <input type="text"/></p> <p>xii) <input type="text"/></p> <p>xiii) <input type="text"/></p> <p>xiv) <input type="text"/></p> <p>F <input type="text"/></p> <p>0.0% <input type="text"/></p> <p>0.0% <input type="text"/></p> <p>No <input type="text"/></p> | <p><b>2009-10</b></p> <p>Table 1 line 1.0.1 less ii), iii) &amp; iv) below</p> <p>Table 2 line (35) column 5</p> <p>SBS table line 8 less vi) below</p> <p>SBS table line 3c less vi) below</p> <p>Table 1 line 1.0.9</p> <p>Table 1 lines 1.1.1 to 1.5.9 inclusive + 1.7.1 + 1.7.2</p> <p>SBS table line 8 less ii) above</p> <p>SBS table line 3c less vi) above</p> <p>Table 1 line 1.0.1 less ix), xi) &amp; xii) below</p> <p>Table 2 line (35) column 5</p> <p>SBS table line 8 less xii) below</p> <p>SBS table line 3c less xiv) below</p> <p>Table 1 line 1.0.9</p> <p>Table 1 lines 1.1.1 to 1.5.9 inclusive + 1.7.1 + 1.7.2</p> <p>SBS table line 8 less xi) above</p> <p>SBS table line 3c less xi) above</p> |                      |
| <p>Percentage Increase in ISB and PVI <math>(A+B)(C+D) / (C+D)</math></p> <p>Percentage Increase in Schools Budget <math>(E-F)/F</math></p> <p><b>Has the Central Expenditure Limit been breached?</b></p> <p><b>Where a breach is shown, has this been agreed with the Schools Forum</b></p> <p><b>Date and Minute of meeting</b></p>   |   |   |                      |

**EARLY YEARS : FUNDING PERIOD 3 - 2010-11**

**Children, Schools and Families Financial Data Collection** **Annex to Table 1: Early Years Expenditure**

| YEAR    | 2010-11 | Local Education Authority Name | Local Education Authority Number | E-Mail Address  | E-Mail Address |
|---------|---------|--------------------------------|----------------------------------|-----------------|----------------|
| CONTACT | TEL     | Version No                     | Completion Date                  | Completion Date |                |

**EARLY YEARS EXPENDITURE ON THE FREE ENTITLEMENT**

**Expenditure on the free entitlement delegated to early years providers**

- EY1.1 Maintained nursery schools
- EY1.2 Maintained nursery classes in primary schools
- EY1.3 Private, Voluntary and Independent Providers
- EY1.4 Total 2008-09 expenditure on the free entitlement delegated to early years providers**

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**Method of counting children for funding the free entitlement**

- EY2.1 Maintained nursery schools
- EY2.2 Maintained nursery classes in primary schools
- EY2.3 Private, Voluntary and Independent Providers

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**Hourly rate at which the Local Authority funds providers for the free entitlement**

- EY3.1 Maintained nursery schools
- EY3.2 Maintained nursery classes in primary schools
- EY3.31 Private, Voluntary and Independent Providers (average rate)
- EY3.32 Private, Voluntary and Independent Providers (minimum rate)
- EY3.33 Private, Voluntary and Independent Providers (maximum rate)

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**Central Expenditure in respect of the free entitlement to early years**

- EY4.1 Maintained nursery schools
- EY4.2 Maintained nursery classes in primary schools
- EY4.3 Private, Voluntary and Independent Providers
- EY4.4 Total 2008-09 central expenditure in respect of early years education**

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**January 2008 pupil count: children accessing the free entitlement (PTE)**

- EY5.1 Maintained nursery schools
- EY5.2 Maintained nursery classes in primary schools
- EY5.3 Private, Voluntary and Independent Providers
- EY5.4 Total 2008-09 children accessing the free entitlement (PTE)**

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**YOUTH SERVICE ANNEX: FUNDING PERIOD 3 - 2010-11**

**Children, Schools and Families Financial Data Collection** **Annex to Table 1: Youth Service**

|                |         |                                  |  |   |  |                        |  |
|----------------|---------|----------------------------------|--|---|--|------------------------|--|
| <b>YEAR</b>    | 2010-11 | <b>Local Education Authority</b> |  | <b>Local Education Authority Number</b> |  | <b>E-Mail Address</b>  |  |
| <b>CONTACT</b> |         | <b>TEL</b>                       |  | <b>Version No</b>                       |  | <b>Completion Date</b> |  |

| <b>YOUTH SERVICE (NET)</b>                                       | <b>LEA Direct Spend</b> | <b>Contracted with Voluntary Organisations</b> | <b>Contracted with Other Organisations</b> | <b>Voluntary Organisations Grant Aid</b> | <b>TOTAL</b> |
|--|-------------------------|--|--|--|--------------|
| <b>Management</b>  |                         |  |  |  |              |
| Full Time  |                         |  |  |  |              |
| Part Time  |                         |  |  |  |              |
| <b>Youth Workers</b>   |                         |  |  |  |              |
| Full Time  |                         |  |  |  |              |
| Part Time  |                         |  |  |  |              |
| <b>Support Staff</b>   |                         |  |  |  |              |
| Full Time  |                         |  |  |  |              |
| Part Time  |                         |  |  |  |              |
| <b>Staff Training</b>  |                         |  |  |  |              |
| <b>Non-Staff Costs</b>   |                         |  |  |  |              |
| <b>Total Running Costs (Table 1, Line 3.0.1, Net)</b>            |                         |  |  |  |              |
| <b>Capital (Table 1, Line 3.0.6, Net, Youth Service element)</b> |                         |  |  |  |              |
| <b>YOUTH SERVICE TOTAL</b>                                       |                         |  |  |  |              |



| Special schools                    |              | (3) Total place led funding<br>£ | (4) Total Pupil Led Funding<br>£ | (6) Total AEN - Learning needs associated with EAL<br>£ | (10) Total AEN - Social Need<br>£ | (11) Total Site-specific factors (including pupil-led)<br>£ | (12) Total School-specific factors (including pupil-led)<br>£ | (13) Total budget adjustments<br>£ | (14) Minimum funding guarantee<br>£ | (15) TOTAL BUDGET SHARE |   |                  |
|------------------------------------|--------------|----------------------------------|----------------------------------|---|-----------------------------------|---|---|------------------------------------|-------------------------------------|-------------------------|---|------------------|
| (1) School name                    | (2) DCSF No. |                                  |                                  |   |                                   |   |   |                                    |                                     | £                       | (16) January 2010 Pupil Count (FTE registered pupils) | (17) £ per pupil |
|                                    |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |
|                                    |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |
|                                    |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |
|                                    |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |
|                                    |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |
|                                    |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |
| (34) Total/average Special Schools |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |
| (35) Total All Schools             |              |                                  |                                  |   |                                   |   |   |                                    |                                     |                         |   |                  |

**Memorandum items**

|   |  |
|---|--|
| (36) Academy Funding for SEN pupils that would normally be delegated  |  |
| (37) Total ISB  |  |
| (38) Academy Specific Grants  |  |
| (39) Unallocated Specific Grants                                      |  |
| (40) Total Specific Grants  |  |
| (41) Unallocated Threshold and Performance Pay                        |  |
| (42) Total Threshold and Performance Pay                              |  |
| (43) Unallocated funding to support schools in financial difficulties |  |
| (44) Total funding for schools in financial difficulty                |  |

| Memorandum items            |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|-----------------------------|---|--|--|---|--------------------------------------|------------------------------------|--|--------------------------------|-------------------------------|-----------------------------|
| Grants                      |   |  |  |   |                                      |                                    |  | Other                          |                               |                             |
| (19) SCHOOL STANDARDS GRANT | (20) SCHOOL STANDARDS GRANT (PERSONALISATION) | (21) SCHOOL DEVELOPMENT GRANT - MAIN 2009-10 | (22) SCHOOL DEVELOPMENT GRANT - MAIN 2010-11 | (23) SCHOOL DEVELOPMENT GRANT - OTHER 2010-11 | (24) OTHER STANDARDS FUND ALLOCATION | (25) THRESHOLD AND PERFORMANCE PAY | (26) SUPPORT FOR SCHOOLS IN FINANCIAL DIFFICULTY | (28) LSC Pupils (January 2010) | (29) SCHOOL OPENING / CLOSING | (30) DATE OPENING / CLOSING |
| £                           | £   | £  | £  | £   | £                                    | £                                  | £  |                                | C OR O                        | dd mm yy                    |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
|                             |   |  |  |   |                                      |                                    |  |                                |                               |                             |
| (35) Total All Schools      |   |  |  |   |                                      |                                    |  |                                |                               |                             |







# PART 4

**TABLE 4: FUNDING PERIOD 3 - 2010-11**

**Children, Schools and Families Financial Data Collection**

**Table 4: Funding Factors**

|         |         |                                |  |                                  |  |                 |  |
|---------|---------|--------------------------------|--|----------------------------------|--|-----------------|--|
| YEAR    | 2010-11 | Local Education Authority Name |  | Local Education Authority Number |  | E-Mail Address  |  |
| CONTACT |         | TEL                            |  | Version No                       |  | Completion Date |  |

**(1) Nursery, Primary and Secondary Schools**

|  |
|--|
| PUPIL COUNT ARRANGEMENTS (2)   |
| Supply Method of pupil count, count dates and worked example(s) where appropriate: |

|                          |                  |                                    |   |
|--------------------------|------------------|------------------------------------|---|
| (3) Band, Range or Level | (4) Unit Value £ | (5) Total allocated through factor | (6) % of Nursery, Primary & Secondary budgets |
|--------------------------|------------------|------------------------------------|---|

| AGE-WEIGHTED FUNDING (7) |             |   | Weighting Ratios (8) |  |            |  | Pupil numbers (9) |
|--------------------------|-------------|---|----------------------|--|------------|--|-------------------|
| Key Stage                | School Year | Age group (pupils' ages as at 31 <sup>st</sup> August 2010) |                      |  |            |  |                   |
| -                        | Nursery     | 3 yr old  |                      |  | Nursery:   |  |                   |
|                          | Nursery     | 4 yr old  |                      |  |            |  |                   |
| -                        | Reception   |   |                      |  |            |  |                   |
| 1                        | 1           | 5   |                      |  |            |  |                   |
|                          | 2           | 6   |                      |  |            |  |                   |
|                          | 3           | 7   |                      |  |            |  |                   |
| 2                        | 4           | 8   |                      |  |            |  |                   |
|                          | 5           | 9   |                      |  |            |  |                   |
|                          | 6           | 10  |                      |  |            |  |                   |
| 3                        | 7           | 11  |                      |  |            |  |                   |
|                          | 8           | 12  |                      |  | Primary:   |  |                   |
|                          | 9           | 13  |                      |  | Secondary: |  |                   |
| 4                        | 10          | 14  |                      |  |            |  |                   |
|                          | 11          | 15  |                      |  |            |  |                   |
| Re-takes (Year 12+)      |             |   |                      |  |            |  |                   |
|                          |             |   |                      |  | Secondary: |  |                   |

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |

|   |  |  |
|---|--|--|
| PRE-SCHOOL Pupil-Led Funding (Nursery Classes) (10) |  |  |
| Nursery 3 year olds                                 |  |  |
| Nursery 4 year olds                                 |  |  |

|          |  |  |
|----------|--|--|
| Nursery: |  |  |
| Primary: |  |  |

|   |
|---|
| Method and worked example(s) where appropriate: |
|   |

Pre-School Place-Led Funding (Nursery Classes) (11)

Nursery 3 year olds    
Nursery 4 year olds

Nursery:

Primary:

Method and worked example(s) where appropriate:

KS 1 ALTERNATIVE FUNDING ROUTES FROM 1/9/03 (i.e. not by AWPU) (12)

Class-based

Nursery:

Class-based

Primary:

Ghost funding

Nursery:

Ghost funding

Primary:

Method and worked example(s) where appropriate:

Difference in funding for pupils educated additionally at F.E colleges, work based learning providers or other providers of more practical learning options

Method and worked example(s) where appropriate:

FUNDING OF SIXTH FORM PUPILS FROM LEA FUNDS (13)

"Top-up"

Secondary:

Method and worked example(s) where appropriate:

OTHER PLACE-LED FUNDING TREATED AS PUPIL-LED such as in boarding units and hostels (14)

|  |  |            |  |
|--|--|------------|--|
|  |  | Nursery:   |  |
|  |  |            |  |
|  |  | Primary:   |  |
|  |  |            |  |
|  |  | Secondary: |  |
|  |  |            |  |

Method and worked example(s) where appropriate:

LSC GRANT ALLOCATION FUNDING SIXTH FORM PUPILS (15)

|                         |  |            |  |
|-------------------------|--|------------|--|
| FTE Pupils (LSC Funded) |  |            |  |
|                         |  | Secondary: |  |

Method and worked example(s) where appropriate:

AEN - Learning needs associated with EAL (16)

|  |  |            |  |
|--|--|------------|--|
|  |  | Nursery:   |  |
|  |  |            |  |
|  |  | Primary:   |  |
|  |  |            |  |
|  |  | Secondary: |  |
|  |  |            |  |

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (pupil-led) (17)

SEN - pupils with or without statements (pupil-led) Named Pupil Individually Assigned Resources (18)

|           |  |            |  |
|-----------|--|------------|--|
| Nursery   |  |            |  |
|           |  |            |  |
|           |  | Nursery:   |  |
|           |  |            |  |
| Primary   |  |            |  |
|           |  | Primary:   |  |
|           |  |            |  |
| Secondary |  |            |  |
|           |  | Secondary: |  |
|           |  |            |  |

SEN - pupils with or without statements (pupil-led) Other (19)

Nursery

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Nursery:

Primary

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Primary:

Secondary

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Secondary:

Method and worked example(s) where appropriate:

SEN - pupils with or without statements (place-led treated as pupil-led) Named Pupil Individually Assigned Resources (20)

Nursery

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|  |
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Nursery:

Primary

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Primary:

Secondary

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Secondary:

SEN - pupils with or without statements (place-led treated as pupil-led) Other (21)

Nursery

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Nursery:

Primary

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Primary:

Secondary

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Secondary:

Method and worked example(s) where appropriate:

AEN - Identified Special Educational Needs (non pupil-led) (22)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Other Learning Needs (23)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

AEN - Social Needs (24)

|  |            |  |
|--|------------|--|
|  |            |  |
|  | Nursery:   |  |
|  |            |  |
|  | Primary:   |  |
|  |            |  |
|  | Secondary: |  |
|  |            |  |

Method and worked example(s) where appropriate:

Site - Specific Factors (Including pupil-led) (25)

Nursery

|  |  |
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Nursery:

Primary

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|  |  |
|  |  |

Primary:

Secondary

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|  |  |
|  |  |

Secondary:

Method and worked example(s) where appropriate:

School - Specific Factors (Including pupil-led) (26)

Nursery

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|  |  |

Nursery:

Primary

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Primary:

Secondary

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Secondary:

Method and worked example(s) where appropriate:

**BUDGET ADJUSTMENTS (27)**

TRANSITIONAL PROVISION (28)

|            |
|------------|
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

ABATEMENT OF Secondary (11-16) FUNDING arising from operation of the Local Education Authority's formula (29)

|            |
|------------|
| Secondary: |
|            |

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (30)

|            |
|------------|
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

Method and worked example(s) where appropriate:

TOTAL FUNDS AVAILABLE TO MAINSTREAM SCHOOLS (31)

|            |
|------------|
| Nursery:   |
|            |
| Primary:   |
|            |
| Secondary: |
|            |

Method and worked example(s) where appropriate:





SITE - SPECIFIC FACTORS (including pupil-led) (37)

|  |  |         |
|--|--|---------|
|  |  | Special |
|  |  |         |
|  |  |         |

Method and worked example(s) where appropriate:

SCHOOL - SPECIFIC FACTORS (including pupil-led) (38)

|  |  |         |
|--|--|---------|
|  |  | Special |
|  |  |         |
|  |  |         |

Method and worked example(s) where appropriate:

BUDGET ADJUSTMENTS e.g transitional provision (39)

Special

Method and worked example(s) where appropriate:

MINIMUM FUNDING GUARANTEE (40)

Special

Method and worked example(s) where appropriate:

TOTAL FUNDS AVAILABLE TO SPECIAL SCHOOLS (41)

Special

TOTAL FUNDS AVAILABLE TO ALL SCHOOLS (42)

All Schools

## **EXPLANATORY NOTE**

*(This note is not part of the Regulations)*

These Regulations describe the form, content and publication requirements relating to budget statements for the financial years 2008-9, 2009-10 and 2010-11.

Budget statements comprise information about planned expenditure and estimated planned expenditure set out against specified headings in the tables comprising Schedules 1 to 3.

The first budget statement under these Regulations must be published before 1st April 2008 and must include information relating to actual planned expenditure for funding period 1 and estimated planned expenditure for funding periods 2 and 3 as specified.

The second budget statement must be published before 1st April 2009 and must include information relating to actual planned expenditure for funding period 2 and revised estimated planned expenditure for funding period 3 as specified.

The third budget statement must be published before 1st April 2010 and must include information relating to actual planned expenditure for funding period 3 as specified.

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E1990 2/2008 181990T 19585