

Annex A

S52 EDUCATION BUDGET STATEMENT (Part 1)

Financial Year:

LA Name:

LA Code (education):

UA Code:

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)
School Name	Official Ref Number	Date Opening / Closing	O / C	Number of Pupils / Places	Budget Share per School				Budget Share per Pupil / Place				Additional Indicative Budget Share £k	Non-ISB Devolved to Schools £k	Year 2 Budget Share £k	Year 3 Budget Share £k
					Core Delegation £k	Discretionary Delegation £k	ALN Delegation £k	Total Delegation £k	Core Delegation £	Discretionary Delegation £	ALN Delegation £	Total Delegation £				
Nursery Schools																
Total / average - nursery schools																
Primary Schools																
Total / average - primary schools																
Middle Schools																
Total / average - middle schools																
Secondary Schools																

**Total / average - secondary schools**

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**Special Schools**


**Total / average - special schools**

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**Total / average - all schools**

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**MEMORANDUM ITEMS**

**Unallocated ISB**

	(24) <b>School Level</b>	(25) <b>Other</b>	(26) <b>Total</b>
Nursery			
Primary			
Middle			
Secondary			
Special			
<b>Total</b>			

**Unallocated  
Non-ISB Funds**

Nursery  
Primary  
Middle  
Secondary  
Special  
**Total**

(27)

**TOTAL ISB**

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(29) **TOTAL NON-ISB**

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## Notes to Part 1

The numbered notes below refer to the items in the table bearing the corresponding number.

1. Enter the names of all maintained schools maintained or to be maintained by the local authority in the financial year in the following order—

- (a) nursery schools;
- (b) primary schools;
- (c) middle schools;
- (d) secondary schools;
- (e) special schools.

2. Opposite the name of each maintained school, enter in Column 2 that school's official reference number.

3. Enter in Column 3, opposite the name of each maintained school, the letter "C" if the school is to close during the financial year and the letter "O" if the school is to open during the financial year; otherwise leave blank.

4. Enter in Column 4 the date that such a school is intended to close or to open, as the case may be; otherwise leave blank.

5. Enter in Column 5, opposite the name of each maintained school, the number of registered pupils at the school required under the allocation formula to be used for the initial determination of that school's budget share, plus the number of places reserved for nursery pupils or for pupils with ALN and funded as such under allocation formula.

In the case of a school that will be open for part of the year only, the number determined in accordance with (a) or (b) above must be reduced to reflect the proportion of the year that the school is to open. For example, if a school is expected to open for 7 months of the financial year, the number shown should be the number of pupils multiplied by 7, then divided by 12.

6. Enter in Column 6, opposite the name of each maintained school (except special schools), the core delegation element of the school's budget share. For schools only open for part of the year, the actual budget share given to the school should be shown.

7. Enter in Column 7, opposite the name of each maintained school (except special schools), the discretionary delegation element of the school's budget share. For schools only open for part of the year, the actual budget share given to the school should be shown.

**8.** Enter in Column 8, opposite the name of each maintained school (except special schools), the ALN delegation element of the school's budget share. For schools only open for part of the year, the actual budget share given to the school should be shown.

**9.** Enter in Column 9, opposite the name of each maintained school, the whole of the school's budget share. For schools only open for part of the year, the actual budget share given to the school should be shown.

**10.** Enter in Column 10, opposite the name of each maintained school (except special schools), the core delegation per pupil at the school calculated by dividing the amount entered in accordance with note 6 by the number of pupils or places for the school entered in accordance with note 5.

**11.** Enter in Column 11, opposite the name of each maintained school (except special schools), the discretionary delegation per pupil at the school calculated by dividing the amount entered in accordance with note 7 by the number of pupils or places for the school entered in accordance with note 5.

**12.** Enter in Column 12, opposite the name of each maintained school (except special schools), the ALN delegation per pupil at the school calculated by dividing the amount entered in accordance with note 8 by the number of pupils or places for the school entered in accordance with note 5.

**13.** Enter in Column 13, opposite the name of each maintained school, the total delegation per pupil at the school calculated by dividing the amount entered in accordance with note 9 by the number of pupils or places for the school entered in accordance with note 5.

**14.** Enter in Column 14, opposite the name of each maintained school, the notional amount which the local authority is intending to delegate subject to the future confirmation of key data.

**15.** Enter in Column 15, opposite the name of each maintained school, the amount of planned additional funding (including grants) proposed to be allocated to the school otherwise than as part of the school's budget share.

**16.** Enter in Column 16, opposite the name of each maintained school, an initial determination of the total of the school's budget share for first subsequent financial year. For schools only open for part of the year, an initial determination of the actual budget share for the school should be shown.

**17.** Enter in Column 17, opposite the name of each maintained school, an initial determination of the total of the school's budget share for second subsequent financial

year. For schools only open for part of the year, an initial determination of the actual budget share for the school should be shown.

**18.** Enter in line 18 in each of Columns 5 to 9 and 14 to 17 the aggregate of the numbers entered in each of those columns in respect of maintained nursery schools and in Columns 10 to 13 the average of the numbers entered in those columns in respect of such schools.

**19.** Enter in line 19 in each of Columns 5 to 9 and 14 to 17 the aggregate of the numbers entered in each of those columns in respect of primary schools and in Columns 10 to 13 the average of the numbers entered in those columns in respect of such schools.

**20.** Enter in line 20 in each of Columns 5 to 9 and 14 to 17 the aggregate of the numbers entered in each of those columns in respect of middle schools and in Columns 10 to 13 the average of the numbers entered in those columns in respect of such schools.

**21.** Enter in line 21 in each of Columns 5 to 9 and 14 to 17 the aggregate of the numbers entered in each of those columns in respect of secondary schools and in Columns 10 to 13 the average of the numbers entered in those columns in respect of such schools.

**22.** Enter in line 22 in each of Columns 9 and 13 to 17 the aggregate of the numbers entered in each of those columns in respect of special schools and in Column 13 the average of the numbers entered in those columns in respect of such schools.

**23.** Enter in line 23 in each of Columns 5 to 9 (or for special schools just in Column 9) and 13 to 17 the aggregate of the numbers entered in each of those columns in respect of all maintained schools and in Columns 10 to 13 (or for special schools just in Column 13) the average of the numbers entered in those columns in respect of such schools.

**24.** Enter in column 24 the amount of the ISB not allocated to maintained schools in Columns 13 and 14, giving an estimated split between nursery, primary, middle, secondary and special schools and giving a total.

**25.** Enter in column 25 the total amount of funding of the kind referred to in Note 15 which the local authority plan to allocate to the maintained school but which is not allocated at the beginning of the financial year, giving an estimated split between nursery, primary, middle, secondary and special schools and giving a total.

**26.** Enter in line 26 the aggregate of the numbers entered in Columns 9 and 14 in accordance with Note 23 and in the “total” box in accordance with Note 24.