

**Schools Forum 2 June 2009**

**Report of the Interim Director of Children's Services**

**Section 52 Budget Statement for 2009/10 and the Allocation of School Budgets**

**Purpose of Report**

1. The purpose of this report is to provide Schools Forum with summary financial data in respect of the Schools Budget allocation for the 2009/10 financial year.

**Budget Working Group Discussed**

2. Yes – part of March 2009 meeting in respect of budgets to be issued to schools for 2009/10.

**Action for Schools Forum**

3. To note the planned allocation of the Dedicated Schools Grant (DSG) funds in respect of the Schools Budget for the 2009/10 financial year.

**Attachments to Report**

4. Appendix A – extract from Table 1, Section 52 Budget Statement 2009/10.
5. Appendix B – Schools Individual Budgets 2009/10.

Sue Coates  
Senior Principal Accountant  
18 May 2009

**Schools Forum 2 June 2009**

**Report of the Interim Director of Children's Services**

**Section 52 Budget Statement for 2009/10 and the Allocation of School Budgets**

1. The purpose of this report is to provide Schools Forum with summary financial data in respect of the Schools Budget allocation for the 2009/10 financial year.

**Background**

2. The Dedicated Schools Grant (DSG) funds the Schools Budget. The Schools Budget is a combination of centrally retained budgets together with the ISB (Individual Schools Budget).
3. The provisional DSG for the 2009/10 financial year is £192.366m; this is subject to confirmation from the DCSF which we expect to receive in June 2009.
4. The Section 52 Budget Statement is a statutory document which is required to be submitted to the DCSF by 31<sup>st</sup> March.
5. A copy of the Section 52 budget statement is available on the Dudley MBC website (<http://www.dudley.gov.uk/council--democracy/council-directorates/childrens-services/financialdocuments>).

It can also be accessed on Inside Dudley:

[\(ChildrensServices/Resources&Planning/Education Finance Team/ Section 52 Budget Statement 2009-10/March 2009\)](#) hard copies are available on request.

6. The Section 52 Budget Statement includes:
  - a. Schools Budget Summary Table
  - b. Table 1 – LEA level information
  - c. Annexes to Table 1 -
  - d. Central Expenditure Limit (CEL)
  - e. Early Years Expenditure
  - f. Table 2 – School level information (summary)
  - g. Table 3a & 3b School level information (detail)
  - h. Table 4 – Funding Factors

7. The Schools Budget Summary table provides an account of the main sources of funding to the Local Authority (LA) to support their Schools Budget.
8. Table 1 of the Section 52 budget statement provides information regarding both the allocation of the Schools Budget and the LA budget. The data is classified under standard categories to aid comparison. An extract from Table 1 for 2009/10 is attached at Appendix A. The Schools Budget element forms the basis of the budget monitoring data presented to Schools Forum.
9. The Central Expenditure Limit table shows whether the LA has met the DCSF targets in respect of central expenditure within the Schools Budget.
10. The Early Years table shows detail of Early Years expenditure on funding the free entitlement to Early Years education, which includes both Maintained and Private, Voluntary and Independent (PVI) provision. Information is also included showing the number of children accessing the free entitlement to nursery education at January 2009.
11. Tables 2, 3a, 3b and 4 show details of schools' delegated budgets and the basis of allocation. This data is compiled from the detailed formula funding allocation exercise carried out by the Local Authority and provides schools with a more meaningful analysis of their budget calculation. Appendix B details the schools delegated budget allocations for 2009/10 together with supplementary information relating to:
  - a. % increase from 2008/09 to 2009/10.
  - b. Pupil number changes from 2008/09 to 2009/10.
  - c. Value of funding per pupil for 2008/09 and 2009/10.
12. The Schools Budget monitoring data is discussed in detail on a monthly basis with the Director of Children's Services and relevant budget holders.
13. Schools Forum will be provided with 2009/10 budget monitoring data in respect of the Schools Budget during the Autumn term.

## **Finance**

14. The funding of schools is prescribed by the DCSF through the School Finance (England) Regulations 2008.
15. Schools Forums are regulated by the School Forums Regulations 2002 as already amended by the Schools Forums (Amendment) Regulations 2004 the Schools Forums (Amendment) 2005 Regulations and the Schools Forums (England) (Amendment) Regulations 2008.
16. From 1<sup>st</sup> April 2006, the Schools Budget has been funded by a direct DCSF grant: Dedicated School Grant (DSG).

## **Law**

17. Councils' LMS Schemes are made under Section 48 of the School Standards and Framework Act 1998. The Education Acts 1996 and 2002 also have provisions relating to school funding.

## **Equality Impact**

18. The Council's Equal Opportunities Policy is taken into account when considering the allocation of resources.

## **Recommendation**

19. Schools Forum to note:

- a. the 2009/10 Schools Budget data for the financial year to 31 March 2010, extracted from the Section 52 budget statement; and
- b. the summary of Individual Schools' delegated funding as attached at Appendices A and B.



**Jane Porter**

**Interim Director of Children's Services**

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