

# **Section 52**

## **Children, Schools & Families Budget Statement**

**2008 to 2011**

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**Date: May 2008**

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## **EDUCATION BUDGET STATEMENT 2008 to 2011**

### **A. GENERAL NOTES**

#### **1. INTRODUCTION**

- 1.1 Before the beginning of each financial year the Local Authority (LA) must publish a budget statement showing planned expenditure on education provision. This is required under section 52 of the Schools Standards & Framework Act 1998 and is a statutory duty of the LA.
- 1.2 The form, content, timing and publication requirements are set out by the Secretary of State under the Education (Budget Statements) (England) Regulations 2005. This means that all LAs produce these statements to a common format using a proforma supplied by the DCSF.
- 1.3 The statement is being distributed to all schools, Chairs of Governors, trade unions & other professional associations, Civic Centre & Education Reception, First Stop Shops & Libraries, officers, link partners, all Council Groups and other interested parties. Additional copies will be sent to schools to be made available at all reasonable times, and free of charge, to parents and members of the public, as required under the regulations.

#### **2. PURPOSE OF THE STATEMENTS**

- 2.1 The Section 52 statements are the means by which the LA informs schools and the general public about its spending plans for the year. The statement records the budgeted total expenditure on education whether or not such expenditure is funded from the education budget. In addition, it shows how the formula works to produce budget shares for each school, how much the LA is proposing to spend on services and activities provided by the LA outside the Individual Schools Budget and each individual school's allocation.
- 2.2 The statements are also used to compare expenditure between LAs at a national level. In particular, the Department for Children's, Schools & Families publishes 'league tables' comparing expenditure by LAs.
- 2.3 The statement will also be a key document used by OfSTED in an inspection of the LA.

#### **3. LINKS TO OTHER REGULATIONS**

- 3.1 The basis for the statement is the Fair Funding framework, introduced under the School Standards & Framework Act, and defined in detail in The Financing of Maintained Schools Regulations 2008. These regulations establish the categories of funding, the allocation arrangements and the contents of Schemes of Financial Delegation.
- 3.2 The key definitions used in the new framework are given in the relevant sections below.

#### **4. SCOPE OF THE STATEMENT**

- 4.1 As mentioned above, these statements cover spending at both school and LA level, on all primary (including nursery classes), secondary and special schools maintained by the LA and on all other educational expenditure by the authority. It must show budgeted total expenditure on education, whether or not such expenditure is funded from the education budget.
- 4.2 Information is also included, where applicable, on any transitional funding for schools, which were grant maintained up to 31 August 1999.

#### **5. GENERAL PRINCIPLES & FORMAT OF THE STATEMENT**

- 5.1 All financial information in the budget statement is presented in pounds, and not in thousands.
- 5.2 Interest earned on school balances is excluded from the statement.
- 5.3 All delegated items are shown on a full-cost basis i.e. inclusive of all overheads.
- 5.4 Devolved (earmarked) funding is taken to have the following key characteristics:

- a) It is allocated to schools, and is likely to be subject to conditions regarding the purposes for which it may be used
- b) It does not form part of schools' budget shares (i.e. formula allocation)
- c) Subject to a), it may be spent as the governing body of a school sees fit.

5.5 The budget statement has been changed from previous years and in line with the changes to school funding arrangements, information is included for the next three financial years (2008/09, 2009/10 and 2010/11). The information is presented in two sections, one for each year, and within each section there are five parts. These include:

Summary Table:	A summary for the Schools Budget
Table 1:	The total planned education spending by the LA in 2008/09.
	Annex to Table 1 – Central Expenditure Limit:
	Annex to Table 1 – Early Years
	Annex to Table 1 – Youth Service: The planned net expenditure on the Youth Service
Table 2:	A list of school budget shares.
Table 3	Formula factors at school level - the calculation of each school's budget share.
Table 4:	The LA's allocation formula

5.6 The statement includes estimates of expected income but does not include income accruing to schools and governing bodies for example for school meals of interest earned on balances.

## 6. DESCRIPTION OF TABLES

### 6.1 Summary Table

This is a statement that provides an account of the main sources of funding available to the LA in 2008/09 for schools in comparison to the amount actually provided by the Dedicated Schools Grant.

### 6.2 Table 1

This budget statement shows an overall picture of the LA's planned spending on educational provision (both school and non-school). Information provided in this Table enables a comparison to be made between the funding being allocated directly to schools and the amount being spent other than on schools, retained centrally or devolved by the LA.

### 6.3 Table 2

Table 2 is linked to Table 3 – it summarises the main formula funding elements and lists the budget share and the per pupil or place share for each school.

### 6.4 Table 3

This shows how the LAs formula (described in Table 4) has been applied to each school to calculate its budget share, including all the relevant factors and lump sums, and the numbers of pupils in each school year used to allocate pupil-led funding.

### 6.5 Table 4

This is where the LA is required to set out the detail of every formula factor, and each school must be able to relate its own budget share back to the items set out in this part. Consequently the Table includes a complete list of all the factors and values in the schools' funding formula and details of the funds allocated across all schools according to each factor.

**LONDON BOROUGH OF ENFIELD**  
**2008/09 SECTION 52 STATEMENT**  
**ANNEX TO TABLE 1**

**SCHOOL SECTOR ANALYSIS**

In arriving at the sector analysis of LEA retained services, a number of bases have been used. These include:

- a) Direct allocation where expenditure can be directly attributed to specific sectors e.g. PRC / redundancy, existing early retirements, staff costs - supply cover, pupil and student award schemes.
- b) Time recording data provide by service providers. This may also be used to identify the cost of an activity, which is then analysed over sectors using a further basis appropriate to the activity concerned.
- c) Apportionments over sectors may be based on pupil numbers (January 2006 PLASC), total employee numbers, pro rata to expenditure per sector or an assessment by the service provider of the planned level of expenditure in each sector.

Each line in the statement may reflect a number of different bases dependant on the mix of services within each line.

**MISCELLANEOUS (less than 0.1% total net SB)**

This heading includes the funding in respect of the Enfield Education Business Partnership of £46,838, Schools postal services of £60,104, Governor Training of £26,200, Miscellaneous R&M & rent of £9,680 and a provision for the loss of the Training Development Agency grant of £20,580.