

## **DEADLINE FOR SUBMISSION OF BUDGET PLANS**

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### **1. Purpose**

To inform the Schools Forum of the reasons behind the 1<sup>st</sup> May being the deadline for the submission of budget plans.

### **2. Recommendations**

That the Schools Forum notes the report.

### **3. Background**

The statutory regulations stipulate that the local authority must issue budget shares to schools by no later than 31<sup>st</sup> March and that the authority cannot stipulate a date for the return of budget plans from schools earlier than 1 May.

Best practice would suggest that any plan ought to be in place before the start of the time period to which the plan relates. Given that the financial year starts on 1<sup>st</sup> April, it follows that the schools budget plan ought to be in place by 31<sup>st</sup> March. However, this can only happen if information upon which the plan is based is available in advance of the time when the plan is set. Whilst there are a number of factors affecting a budget plan, the quantum of available resources, in this case defined by the budget share, is obviously a key piece of information. Recognising this, the authority has ensured that in recent years budget shares are delivered to schools well in advance of the statutory deadline.

The authority is constrained in what it is able to do in respect of providing budget shares early, mainly due to its own dependency upon funding announcements from government, but also legal and political processes around setting its budget. Further, the school funding mechanisms are heavily reliant upon pupil data, which is not available until late January/early February. Nonetheless, the authority aims to deliver school budget shares to schools by 28<sup>th</sup> February, a month in advance of the statutory deadline.

In this context it appears reasonable that schools have 2 months in which to establish a budget plan, albeit it is recognised that the Easter break will fall in this period. Very occasionally a school has managed to submit a budget plan before the end of March, but the second half of April is more common.

It has been argued that it is difficult for small schools to achieve the deadline. However, there is no evidence that those schools that have failed to meet the deadline in the past are of any particular size. The timing of available information, holidays and submission deadlines are all known well in advance.

Governing bodies can be arranged in order to take the necessary key decisions for the school to comply with the deadline provided that this is properly organised.