

Sunderland City Council
Schools and Academies Funding Formula

Funding Factor	Status	2013-14 Basis of Allocation	2014-15 Basis of Allocation	Funding Rates 2013/2014	Funding Rates 2014/2015
<p>Basic Entitlement: Assigns funding to individual pupils with the number of pupils for each school or academy based on the October pupil census.</p>	Compulsory	Allocated based on an age weighted pupil unit (AWPU) where funding is weighted to reflect the different costs at Primary, KS3 & KS4. Pupil numbers are reduced to reflect high need pupils in resourced / specialist provisions based in schools and academies. Does not apply where the places commissioned are for pupil's on the roll of another school.	No change other than minimum values set of £2,000 for primary and £3,000 for secondary schools and academies. Pupil number are reduced by the number of high needs places commissioned in resourced / specialist provisions based in schools and academies. Does not apply where the places commissioned are for pupil's on the roll of another school.	Primary - £2848.67 KS3 - £4289.43 KS4 - £4526.39	Primary - £2875.95 KS3 - £4316.72 KS4 - £4553.67
<p>Deprivation: LA's can opt to choose FSM and/or the Income Deprivation Affecting Children Index (IDACI). For FSM either FSM at the census date or FSM "ever 6" but not both. The IDACI measure uses 6 bands with LA's determining the value at each band.</p>	Compulsory	Total deprivation funding split 25% FSM and 75% IDACI. FSM factor is based on FSM Ever 6 data and IDACI uses bands 1-6 with the minimum funding per pupil at band 1 and maximum at band 6.	No change nationally or locally.	FSM Ever 6 (P) - £436.77 FSM Ever 6 (S) - £402.12 IDACI Band 1- £193.65 (P) £203.72 (S) IDACI Band 2 - £193.65 (P) £203.72 (S) IDACI Band 3 - £387.29 (P) £407.44 (S) IDACI Band 4 - £580.93 (P) £611.16 (S) IDACI Band 5 - £774.58 (P) £814.89 (S) IDACI Band 6 - £968.22 (P) £1018.61 (S)	FSM Ever 6 (P) - £436.77 FSM Ever 6 (S) - £402.12 IDACI Band 1- £193.64 (P) £203.72 (S) IDACI Band 2 - £193.64 (P) £203.72 (S) IDACI Band 3 - £387.29 (P) £407.44 (S) IDACI Band 4 - £580.93 (P) £611.16 (S) IDACI Band 5 - £774.58 (P) £814.89 (S) IDACI Band 6 - £968.22 (P) £1018.61 (S)
<p>Prior Attainment: Factor used by nearly all local authorities and acts as a proxy indicator for low level high incidence need.</p>	Optional	<p>Primary: Early Years Foundation Stage Profile for Year Groups 1 to 4 based on those pupils achieving below either 73 or 78 points.</p> <p>Secondary: Based on the number of pupils not achieving level 4 in English and Maths at KS2.</p>	The primary indicator will change in 2014-15 to include those pupils who failed to achieve a good level of development for the cohort of pupils in the 2013 assessments. For older year groups the 2013-14 basis will still apply. The secondary indicator will be based on pupils not achieving level 4 in English or Maths at KS2.	LCHI Need (P) - £317.79 LCHI Need (S) - £873.44	LCHI Need (P) - £317.79 LCHI Need (S) - £378.12
<p>Looked after Children: Proxy indicator of additional need as evidence shows that children who have been looked after are likely to under perform at Key Stage 4</p>	Optional	Based on a return completed in March each year by LA's and mapped to schools using January school census. LA's could use one of three indicators, all children looked after, those looked after for at least 6 months, or those children looked after for at least a year.	Only one indicator will be allowed based on all children looked after at 31st March 2013, regardless of how long they have been looked after as this has no bearing on their performance at KS4. No change for Sunderland as all LAC option used in 2013-14.	Rate per LAC = £500	Rate per LAC = £500
<p>English as an Additional Language: Proxy indicator of AEN. Sunderland uses data based on pupils in the system for up to the maximum of three years.</p>	Optional	EAL pupils could attract additional funding up to three years after they enter statutory school system. A single indicator based on either 1,2 or 3 years could be applied with separate values for primary and secondary.	No change nationally or locally.	EAL (P) - £1041.63 EAL (S) - £1437.19	EAL (P) - £1041.63 EAL (S) - £1437.19
<p>Pupil Mobility: Proxy indicator of AEN but due to introduction of threshold recommendation is to remove the factor</p>	Optional	Counts pupils who enter the school in the last three academic years but did not start in August, September or January (for reception pupils). Separate unit values for primary and secondary can apply.	A 10% threshold has been introduced so schools will only qualify for the measure if more than 10% of their pupils are counted as mobile. Funding will be allocated based on the proportion above the threshold e.g. if a school has 12% mobility then 2% of pupils would attract funding.	Mobility per Pupil - £100	Factor not applied in Sunderland Formula

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<p>Sparsity: Enables small necessary schools in rural areas to be supported. In Sunderland the average primary sparsity distance is 0.47 miles and 1.1 miles for secondary. These are below the recommended limits published by DfE of 2 miles for primary and 3 miles for secondary.</p>	Optional	Not in use	Pupils are allocated to their nearest school. For each school the average distance as the crow flies to those pupil's second nearest school is calculated. Schools only qualify for funding if the distance is greater than 2 miles for primary and 3 for secondary and if they have fewer than 150 pupils in primary and 600 for secondary. Maximum value that can be allocated is £100,000 and distance can be greater or smaller.	Factor not applied in Sunderland Formula	Factor not applied in Sunderland Formula
<p>Lump Sum: This factor is optional but is used by all local authorities</p>	Optional	Had to be a single value applied to all schools up to a maximum of £200,000	Lump sum for 2014/2105 can now be set at different values for primary and secondary schools to a maximum level of £175,000.	Lump sum rate for Sunderland is £150,000.	Lump sum rate for Sunderland is £150,000.
<p>Rates: Based on actual costs with Academies funded outside their main budget allocation</p>	Optional	Funded based on estimated actual costs and adjusted for in the following financial year	No change nationally or locally.	Variable based on individual school and academy costs	Variable based on individual school and academy costs
<p>Private Finance Initiative (PFI) Contracts: Provides funding to schools or academies which have unavoidable premises costs because they are a PFI school and where the PFI affordability gap is delegated and paid back to the local authority.</p>	Optional	A lump sum calculated each year based on estimated actual costs, taking into account funding already included in schools / academies delegated budgets for hard / soft facilities management costs compared to the overall annual contract payment due.	No change nationally or locally.	Variable based on individual school and academy costs	Variable based on individual school and academy costs
<p>Exceptional Circumstances: Additional Lump Sum for schools amalgamated during 2013/2014</p>		Not in Use	Where schools amalgamate they will retain 85% of the total lump sums in the year after the amalgamation instead of going down to a single lump sum immediately.	Variable based on individual school and academy budget shares between each financial year.	Variable based on number of predecessor schools' lump sums. We will have exceptional circumstance funding of £105,000 for the amalgamated Northern Saints School
<p>Minimum Funding Guarantee: Required under the provisions made in regulation 20 of the Schools and Early Years Finance Regulations 2012.</p>	Compulsory	An amount calculated and added to a school / academy budget share to ensure that funding per pupil does not decrease / increase by more than the percentage set by regulations, currently set at 1.5%.	No change nationally or locally.	Variable based on individual school and academy budget shares between each financial year.	Variable based on individual school and academy budget shares between each financial year.