

# Children and Young People's Overview and Scrutiny Committee

13 January 2019

## Mainstream Primary and Secondary School Funding Formula 2020-21 and High Needs Block



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### Report of John Pearce, Corporate Director of Children and Young People's Services and John Hewitt, Corporate Director of Resources

#### Electoral division(s) affected:

Countywide

#### Purpose of the Report

- 1 To update Members on mainstream primary and secondary formula funding arrangements for the coming financial year and the approach to setting the local formula for mainstream primary and secondary funding in 2020-21.
- 2 To update members on the High Needs Block (HNB), which is used to fund provision for children and young people with Special Educational Needs and Disabilities (SEND).

#### Executive summary

- 3 Initial information about mainstream primary and secondary formula funding for the 2020-21 financial year was published on 11 October 2019, following the Spending Round announcements on 4 September 2019. Final allocations were only confirmed on Friday 20 December, 2019.
- 4 There has been a national increase in funding for 2020-21 and further increases are planned for 2021-22 and 2022-23.
- 5 There is no information at this stage about how much of the announced increases for 2021-22 and 2022-23 will be for the mainstream formula.
- 6 In 2020-21, funding per pupil in Durham has increased by 3.50%, which is less than both the national average increase (4.18%) and the average increase for the north east (3.85%).

- 7 The National Funding Formula (NFF), which determines Units of Funding (UFs), has been amended for 2020-21 as follows:
- (a) The mobility factor has been amended and Durham will receive funding for this for the first time. The proposed local formula includes the mobility factor for the first time;
  - (b) There has been an increase in most factor values;
  - (c) The Minimum Per Pupil Funding (MPPF) values have increased and the NFF values will be mandatory for local formulas;
  - (d) The MPPF changes are of concern, because they tend to benefit larger schools with relatively few pupils with additional needs. The council has responded to a consultation about this and a copy of the response is included at appendix 2;
  - (e) There are changes to the Funding Floor in the NFF and to the Minimum Funding Guarantee (MFG) in the local formula, which means that all schools will see an increase in funding *per pupil* next year. Local formulas are allowed to vary the MFG value, between a minimum of a 0.5% increase per pupil and a 1.84% increase per pupil;
  - (f) The increase in funding per pupil does not protect schools from falling rolls and some funding is excluded from the MFG calculation.
- 8 The council will continue to determine the local formula next year and has taken account of feedback from the Schools Forum when doing so. The formula includes a continuation of the transition from the local formula to the NFF at the rate set last year i.e. to achieve convergence with the NFF in 2021-22.
- 9 The formula includes a mobility factor and uses a transitional rate for the MFG. (Unlike previous years, the MFG next year will be used to guarantee a minimum increase in funding per pupil, rather than capping the maximum decrease in funding per pupil.)
- 10 The council's Pupil Place Planning Team has determined that there should be no adjustments to the funding for schools in respect of growth next year as there are surplus places available in all pupil place planning areas and where there is pressure on places, this relates to parental preference as opposed to basic need. A special meeting of the Schools Forum on 7 January will consider growth funding issues in more detail.

- 11 The formula for 2020-21 and the impact on individual schools is set out in Appendices 3 and 4, and the Equality Impact Assessment in Appendix 5.
- 12 The budget for provision for pupils with SEND continues to be insufficient to meet costs, despite the additional funding that has been provided through the HNB for next year. The current projections show that there is still insufficient funding available to cover demand and current cost pressures. The shortfall in funding and current cost projections indicate that the current position is not sustainable.
- 13 There are now limits on the ability of local authorities to supplement HNB funding from their own resources.
- 14 Following a review of SEND provision, a financial strategy has been proposed which will provide for a financially stable SEND provision in future years. This is to be considered by cabinet in January 2020.

### **Recommendation(s)**

- 15 Members of the Children and Young People's Overview and Scrutiny Committee are requested to:
  - (a) note the contents of this report; and
  - (b) continue to monitor progress towards implementation of the NFF.

## **Background**

- 16 The main source of funding for mainstream primary and secondary schools and academies is the local schools funding formula. Each local authority currently sets its own formula, within the restrictions imposed by the Department for Education (DfE), after consultation with all schools and the Schools Forum.
- 17 The DfE had previously announced that local formulas would be replaced by the National Funding Formula (NFF) from 2020-21, however, in July 2018, the DfE announced that this had been postponed and that local authorities would continue to set local formulas for 2020-21.
- 18 The DfE has cited the progress made by local authorities in aligning local formulas to the NFF as the main reason for this decision. The DfE has expressed confidence that in the light of the progress made to date, local authorities will continue to increase the alignment between local formulas and the NFF in 2020-21 without the need for a statutory deadline of convergence in that year.
- 19 In the DfE's view, the NFF is fairer to schools than local formulas, because it is consistent between local authority areas, but in the short-term it sees local formulas as a way to allow a smoother transition from local formulas to the NFF. The argument for this is presumably that each local authority is best placed to determine the appropriate transition to the NFF from its local formula.
- 20 Members will recall that in setting the funding formula for mainstream primary and secondary schools for the current financial year, the Council took the decision to use a transitional formula, intended to smooth the transition from the local formula in place in 2017-18 to the NFF allocations for individual schools over three years (2018-19 to 2020-21), with the plan to fully converge in 2021-22.

## **Mainstream School Funding**

- 21 Funding for the mainstream primary and secondary schools formula is provided through the Dedicated Schools Grant (DSG).
- 22 Until 2013-14 this funding was provided as a single allocation and local authorities had significant freedom as to how this was used, with the caveat that it was ring-fenced for spending on schools / education.
- 23 Since 2013-14, the DSG has been split into different funding blocks, Early Years, Schools and High Needs (for Special Educational Needs and Disabilities - SEND) and from 2018-19 a Central School Services

Block (CSSB) - the latter includes funding formerly included in the Schools Block and Education Services Grant.

- 24 The allocations for academies, as determined by the local formula, is recouped from the overall DSG allocations for the local authority area and paid by the DfE directly to academies in County Durham in line with the local formula allocations for those individual schools. The remaining DSG is paid to the Council, who then distributes (delegates) the funding received to individual maintained schools in line with their formula funding allocations.
- 25 Mainstream schools and academies also receive funding for pupils with SEND, early years, (where primary schools have nursery units), post-16 funding and also the Pupil Premium, which in the current year is worth circa £20 million. From 2013-14 there were also changes to how SEND is funded, which affected the amounts provided through formula funding.
- 26 Since 2013-14, local discretion over the local funding formulae has been significantly restricted, with local decision making limited to the application of a relatively small number of permissible formula factors, most of which are pupil-led, (i.e. an amount per eligible pupil), with the rest being either school-led, (i.e. an amount per school), or relating to specific premises related costs, for example rates. There is still, however, significant variation between local authorities in terms of the proportions of funding allocated to different factors within the formula.
- 27 Local authorities must consult Schools Forums and all schools about their local formula proposals before deciding on the final version. The final version of the formula needs to be determined in early January, by adjusting the agreed formula to take account of the actual amount of funding received and updated pupil numbers and data for schools, including the proportions of pupils deemed to have additional needs, for example, because of deprivation.
- 28 Between 2013-14 and 2017-18, the local schools funding formula in County Durham did not change significantly from year-to-year in respect of either the formula factors or the proportions allocated to each factor and in general there was little appetite by either schools or the Council to make significant changes to the formula. This was a conscious decision to try and restrict turbulence within the schools funding regime in County Durham. One exception was in respect of the primary lump sum, which was reduced over the two years 2016-17 and 2017-18, with the funding released being used to increase the allocation of pupil-led funding for secondary schools.

- 29 For 2018-19, the Council decided to begin to make changes to the formula, to reduce differences between the local formula used in previous years and the NFF, with the intention of smoothing the transition to the NFF over the remaining two years of the local formula. That decision does not preclude the Council making a different decision for 2020-21, but because government policy has not changed, no change to the rate of transition is recommended.

## **2020-21 funding and formula requirements**

- 30 The majority of funding for individual schools is provided through the mainstream primary and secondary schools funding formula. DSG funding for this formula is provided as an amount per primary and secondary pupil.
- 31 The amounts per pupil are set each year by central government and are calculated using notional NFF allocations to each school using pupil numbers from the previous financial year.
- 32 Information about mainstream formula funding for the 2020-21 financial year was published on 11 October, 2019, following the Spending Round announcements on 4 September, 2019. Final allocations were only confirmed on Friday 20 December, 2019. The information is summarised below.

### ***National Increases in funding***

- 33 There will be a national increase in core schools funding compared to 2019-20 funding, details as follows:
- (a) £2.6 billion for 2020-21
  - (b) £4.8 billion for 2021-22 (an additional £2.2 billion on 2020-21)
  - (c) £7.1 billion for 2022-23 (an additional £2.3 billion on 2021-22)
- 34 Core schools funding includes:
- (d) Schools Block – which funds the mainstream primary and secondary formula
  - (e) High Needs Block (HNB) – which funds provision for Special Educational Needs and Disabilities
  - (f) Central School Services Block – which funds local authority centrally managed services and historic commitments

- (g) Teachers' Pay Grant (TPG), which will include the cost of increasing the starting salary for teachers to £30,000 by 2022-23. (Separate funding is being provided over the next three years to fund the increase in Teachers Pension contributions).

35 For 2020-21, the HNB has increased nationally by £0.780 million, and the Central School Services Block has been cut.

36 There is no information about how the 2021-22 and 2022-23 increases will be allocated between the Schools Block, the HNB, the Central Schools Services Block and the TPG.

### ***Schools Block funding for Durham***

37 Most of the Schools Block funding is based on amounts per pupil. The funding per pupil is different between primary and secondary and these are known as Units of Funding (UFs). The UF's are determined by dividing notional NFF allocations by pupil numbers and separate UF's are calculated for each local authority, based on its maintained schools and academies. The UF's for Durham for 2020-21 have increased compared to the 2019-20 UF's:

<b><i>Primary and secondary Units of Funding per Pupil</i></b>	<b>Primary</b>	<b>Secondary</b>
2020-21	£4,405.58	£5,382.04
2019-20	£4,227.34	£5,253.15
Increase	£178.24 4.2%	£128.89 2.5%

38 Members should note that the increase in UF's does not mean that all schools will see an increase in their funding level, particularly if there has been a significant reduction in the overall number of pupils on roll or a reduction in the number of pupils who are eligible for additional needs funding (deprivation and low prior attainment).

39 In addition, the Schools Block includes funding for premises and growth:

- (a) Funding for premises is provided as a lump sum, based on historic funding allocations and has increased from £6.665 million to £6.675 million in 2020-21.
- (b) Growth funding is £2.442 million for 2020-21. Growth funding is allocated as an amount per additional pupil for areas where the number of pupils on roll has increased from year-to-year.

The areas used are Middle Super Output Areas, which typically include several schools. Last year's funding was £1.574 million, and this funding is expected to be volatile from year-to-year.

The basis of allocation is a way to allocate funding between local authorities relative to changes in pupil numbers and does not imply that schools in those areas where there has been an increase should receive additional funding. The circumstances in which funding can be allocated to schools in respect of growth are limited and no allocations are proposed in Durham for 2020-21.

40 The table below summarises the funding for 2020-21:

<b>Schools Block Funding 2020-21</b>	<b>Primary</b>	<b>Secondary</b>	<b>Total</b>
October 2019 Pupils	38,844	25,880	64,724
2020-21 units of funding (UFs)	£4,405.58	£5,382.04	
<b>Funding (£m)</b>			
Pupil funding	171.130	139.287	310.418
Premises			6.675
Growth			2.442
<b>Estimated funding for 2020-21</b>			<b>319.534</b>
Funding for 2019-20			305.929
<b>Change in funding</b>			<b>13.605</b> <b>4.4%</b>

41 The DfE publishes figures showing the overall change in funding per pupil excluding growth, which is not part of the NFF. The overall increase for this measure is 4.18% but is only 3.50% for Durham, which is also below the average for the region. The average increase varies for regions:

<b><i>Average increase in funding per pupil, excluding growth</i></b>	<b>2019-20</b>	<b>2020-21</b>	<b>Increase</b>
East Midlands	4,476.77	4,701.66	5.02%
South West	4,393.21	4,613.92	5.02%
South East	4,371.80	4,588.66	4.96%
East of England	4,447.13	4,643.39	4.41%

<b>Average increase in funding per pupil, excluding growth</b>	<b>2019-20</b>	<b>2020-21</b>	<b>Increase</b>
Yorkshire & the Humber	4,622.01	4,819.24	4.27%
North West	4,653.12	4,837.62	3.97%
<b>North East</b>	<b>4,648.75</b>	<b>4,827.63</b>	<b>3.85%</b>
West Midlands	4,651.75	4,822.83	3.68%
London	5,360.25	5,529.19	3.17%

### **Formula funding and local formulas**

- 42 Local authorities will continue to set local formulas for 2020-21. The Government is committed to replacing local formulas with the NFF but, as with previous announcements, has not at this stage made convergence mandatory in 2020-21. The Government has stated that it will continue to work closely with local authorities, schools and others to make the transition away from local formulas as smooth as possible. In Durham, the transitional local formula currently seeks to achieve convergence by 2021-22.
- 43 The NFF uses the same formula factors as in previous years, but there is now a formula factor to allocate mobility funding, which was previously allocated on the basis of historic allocations. Because Durham has never used the mobility factor it has not been funded for the factor previously.
- 44 The factor values in the NFF have been increased by 4%, with the exception of the Free School Meals and PFI factors, which have been increased by inflation (2.3%).
- 45 The Minimum Per Pupil Funding used in the NFF has been increased and it is intended to make this mandatory for local formulas for next year, at the same values as in the NFF:

<b>Minimum Per Pupil Funding values (£/pupil)</b>	<b>Durham local formula</b>	<b>National Funding Formula</b>		
	<b>2019-20</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>
Primary	3,300	3,500	3,750	4,000
Secondary	4,600	4,800	5,000	5,000

- 46 There are concerns about the way in which this factor works as it tends to provide additional funding to larger schools with relatively few pupils with additional needs. The council submitted a response to the consultation and a copy is attached at Appendix 2.
- 47 Other changes affecting formulas next year are:
- (a) The Funding Floor, which provides minimum funding increases in the NFF will be increased to 1.84% per pupil, (it was 1% in 2019-20). Another change affecting the floor is that the baseline used to determine the minimum funding increases will be 2019-20 funding, instead of the 2017-18 funding used in the last two years.
- The Floor is not used in the local formula, but changes to the Minimum Funding Guarantee (MFG) will allow the floor to be replicated in local formulas and this was modelled as an option for the local formula for next year.
- (b) The MFG will guarantee an increase in funding per pupil next year, within the range 0.5% to 1.84%. As already noted, at the maximum level this will replicate the new Funding Floor. Note that the MFG does not protect schools from falling rolls and even with an increase in funding per pupil, a school could still see a reduction in overall funding if pupil numbers are falling.

### **Setting the local formula in Durham**

- 48 On 25 November, 2019 the Schools Forum met to consider the 2020-21 schools formula and to make decisions on de-delegation and centrally managed services. Members voted to continue with the transitional formula used since 2018-19 and the use of a transitional rate of protection through the Minimum Funding Guarantee.
- 49 The outcome of this meeting was factored into a report to Cabinet on 13 December, 2019, which considered the proposals for the local formula in 2020-21 and accepted the recommendation to continue with the transitional formula and to use a transitional rate for the Minimum Funding Guarantee.
- 50 Forum members deferred a decision about the use of growth funding and will have a further meeting on 7 January 2020. Any decision by members to establish a growth fund will reduce the funding available for all schools via the formula as it reduces the funding per pupil through the formula, but would not necessitate a wider change to the transitional basis of the formula.

- 51 Subsequent to this meeting the council's Pupil Place Planning Team has reviewed the use of growth funding and determined that there should be no adjustments in respect of growth funding in 2020-21. This is because there are surplus places available in all pupil place planning area and where there is pressure on places, this relates to parental preference as opposed to basic need. The report to cabinet in December 2019 had initially proposed four primary schools benefit from growth funding in 2020-21.

## **Growth funding**

- 52 This is provided as part of the Schools Block to recognise the need to fund additional places to meet basic need that are not reflected in October School Census pupil numbers.
- 53 Allocations of growth funding are based on year-to-year changes in pupil numbers recorded for Middle-Layer Super Output Areas, which are sub-divisions of each local authority area. This is a formula-based approach to allocating funding between authorities, based on changes which might cause basic need growth, but does not mean that the ESFA has identified actual basic need growth.
- 54 The funding that was allocated to Durham for 2019-20 was £1.574 million. At present there is no information to form a basis for estimating funding in our DSG allocations for 2020-21. The fact that this funding is based on year-to-year changes in pupil numbers rather than total pupil numbers is likely to mean that this funding will be volatile and could change significantly from year-to-year.
- 55 A basic need increase means that there is a shortage of places in the locality, and the school has been asked to expend to accommodate this demand. Funding regulations provide that local authorities can adjust funding to take account of the growth in numbers as a result of basic need. This does not apply where a school expects to take on additional pupils as a result of parental preference, even where encouraged to do so by the local authority; schools are expected to manage these increases within their usual formula funding, based on the previous October's Schools Census.
- 56 Growth does not provide for adjustments to funding where pupil numbers are increasing through parental choice. Following a challenge from a Forum member, the council has consulted the DfE about its decision not to provide growth funding to secondary schools in Bishop Auckland. The DfE was provided with details of the schools and changes in pupil numbers and has not raised any objections to the council's decision not to provide growth funding to these schools.

- 57 Further ESFA guidance about the use of growth funding is expected and the council will consider the implications of this guidance and whether it should change its position on how this is used.
- 58 If this funding was set aside for growth, it would reduce the factor values, and hence funding, allocated through the formula. The growth funding would still be distributed to schools and academies, but only to those qualifying for basic need growth.

### **Options for the local formula in 2020-21**

- 59 A number of options were identified and modelled as part of the process, these are set out below.
- (a) Rate of transition
  - (b) Transfers to the High Needs funding block
  - (c) Minimum Funding Guarantee
  - (d) Mobility factor

#### ***Rate of transition***

- 60 The current local formula is a transitional formula, using the same factors that are used in the NFF and reducing the differences in factor values (£/pupil and £/school) between the old local formula and the NFF over a number of years.
- 61 The current rate of transition anticipates that the local formula will be aligned to the NFF by 2021-22, which is the earliest year in which the NFF could replace local formulas.
- 62 Members may recall that the original plan for transition was for the local formula to align to the NFF by 2020-21, which was originally planned to be the year in which local formulas would be replaced by the NFF. The rate of transition was changed last year after the Government announced that local formulas would continue to be used in 2020-21.

- 63 The table below shows the difference between the local and national formula factor values in each year of the transition:

<b><i>Difference between factor values between local formula and NFF</i></b>		
<b>Year</b>	<b>Original plan</b>	<b>Current plan</b>
2017-18	100%	100%
2018-19	67%	67%
2019-20	33%	45%
2020-21	0%	22%
2021-22	0%	0%

- 64 Recent announcements confirm that Government policy is still to replace local formulas with the NFF, but with the national convergence date still not defined. There is however, a commitment to have a smooth transition.
- 65 The planned increases in funding in 2021-22 and 2022-23 would go some way to offsetting reductions in funding for schools that were adversely affected by the change to the NFF. This makes it more likely that local formulas will be replaced in either 2021-22 or 2022-23.
- 66 In December, Cabinet agreed that there was no reason to alter the current rate of transition.
- 67 Other alternatives in respect of the rate of transition were:

***Align the formula to the NFF from next year***

The council does not see any advantage to this, which would commit to the NFF before it is confirmed that it will replace local formulas and does not allow for the possibility of changes to the NFF before it replaces local formulas.

***Slow down or reverse the current transition***

The council does not see any advantage to this, given that Government policy is still to replace local formulas. Slowing down or reversing transition would lead to greater turbulence when local formulas were replaced.

Most local authorities are moving to align local formulas to the NFF and being an outlier in refusing to do so is unlikely to be helpful in terms of schools avoiding turbulence when local formulas are replaced.

- 68 The Schools Forum meeting on 25 November supported the continued use of the transitional formula, which seeks to achieve convergence with the NFF in 2021-22.

***Transfer to HNB***

- 69 Members will be aware of the significant pressures on the High Needs spending. A report on High Needs Sustainability was considered by Cabinet in July 2019 and outlined proposals to seek to transfer circa £1.5 million from the Schools Block to the HNB in 2020-21 to cushion the impact of planned reductions in HNB spending as part of its review of Special Educational Needs (SEN) provision.
- 70 The increase in HNB funding next year, which is more than was originally estimated, together with the progress that has been made with regards to developing a HN Sustainability Plan to better control expenditure, has resulted in a changed position. The council did not request a transfer for 2020-21. Members should note, however, that the SEN review continues and the outcome of the consultation on the proposals considered by Cabinet in July 2019 will be reported to Cabinet at its meeting this month.

***Minimum Funding Guarantee***

- 71 The Minimum Funding Guarantee (MFG) looks at changes in funding per pupil arising from changes to the formula. In the past it has been used to limit reductions in funding from year-to-year. However, for 2020-21, it is used to guarantee a minimum increase in funding per pupil.
- 72 Local authorities are able to set a minimum increase in a range from 0.5% to 1.84%. The latter is the increase used in the Funding Floor, and an MFG at this level would replicate the Funding Floor, which is part of the NFF, but not part of local formulas.
- 73 It is important to note that the MFG is funded by capping increases in funding per pupil for other schools, so setting a higher rate for the MFG will benefit some schools, but disadvantage others.
- 74 Members should also note that the MFG only applies to funding per pupil, so it does not protect schools from falling rolls.

- 75 The council originally proposed to use 0.5%, because a higher rate would result in a lower cap for other schools. However, following feedback from the Schools Forum, the council proposed to use a rate of 1.17%, which is the mid-point between the minimum and maximum values.
- 76 The impact of the MFG is relatively small and the table below summarises the MFG funding and the cap on increases for the various MFG values that were considered:

<b><i>MFG funding and cap on increases in funding per pupil</i></b>	<b>MFG = 0.5%</b>	<b>MFG = 1.0%</b>	<b>MFG = 1.17%</b>	<b>MFG = 1.5%</b>	<b>MFG = 1.84%</b>
Funding provided through MFG (£000s)	103,000	119,000	125,000	145,000	173,000
Cap on increases in funding per pupil	6.71%	6.51%	6.44%	6.27%	6.06%
Number of schools with MFG funding	10	10	11	13	15
Number of schools that have funding capped	6	11	11	16	19

- 77 The impact of the increase in the MFG value is shown in the table below, which summarises the changes in funding for each of the higher MFG rates compared to the minimum rate of 0.5%.

<b><i>Change in funding with change in rate of MFG from 0.5% to higher rates of protection</i></b>		<b>Rate of MFG</b>			
		<b>1.0%</b>	<b>1.17%</b>	<b>1.5%</b>	<b>1.84%</b>
<b><i>No of schools</i></b>					
With increased funding	Primary	9	10	11	12
	Secondary	1	1	2	3
With decreased funding	Primary	11	11	16	19
	Secondary	-	-	-	-
Total		21	22	29	34
<b><i>Total change in funding (£000s)</i></b>					
With increased funding	Primary	8,000	11,000	18,000	26,000
	Secondary	8,000	11,000	24,000	44,000

<b>Change in funding with change in rate of MFG from 0.5% to higher rates of protection</b>		<b>Rate of MFG</b>			
		<b>1.0%</b>	<b>1.17%</b>	<b>1.5%</b>	<b>1.84%</b>
With decreased funding	Primary	(16,000)	(22,000)	(42,000)	(70,000)
	Secondary	-	-	-	-
	Total	-	-	-	-
<b>Average change in funding (£000s)</b>					
With increased funding	Primary	1,000	1,000	2,000	2,000
	Secondary	8,000	11,000	12,000	15,000
With decreased funding	Primary	(1,000)	(2,000)	(3,000)	(4,000)
	Secondary	-	-	-	-

### **Mobility factor**

- 78 This factor is intended to recognise that pupil movement during the year can, if at a significant level, require schools to provide additional resources to cope with these movements.
- 79 Prior to 2018-19 this factor was not used in the local formula, because the formula allocated funding on the basis of historic data and was not seen as an effective way of targeting funding to schools affected by significant mobility.
- 80 The factor is included in the NFF, but for 2018-19 and 2019-20, funding through the Schools Block was only provided for authorities that were using the factor in 2017-18. Because the factor was not used in the local formula in 2017-18, Durham received no funding for mobility for either 2018-19 or 2019-20 and accordingly this factor has not been included in the transitional formula to date.
- 81 The reason for the DfE's past approach to funding mobility was that there were problems with the data for mobility, which can be distorted when schools convert to sponsored academies or are subject to a reorganisation such as an amalgamation. The DfE used historic allocations as the basis for the 2018-19 and 2019-20 allocations and assumed that authorities that had used the factor had made appropriate adjustments to the data before doing so.
- 82 However, for 2020-21, the factor uses a new method to determine funding and this has been taken into account in the units of funding per pupil for 2020-21.

- 83 The new method is to compare pupils across three years' worth of school censuses, counting as mobile those who were recorded on the spring and summer censuses but not the preceding October census. Schools only receive funding where the proportion of pupils counted as mobile is more than 6% of the number on roll and only for pupils in excess of 6%.
- 84 This factor is part of the NFF and now that it is funded it is consistent to include this factor in the transitional model.
- 85 The factor is relatively small, only 0.05% of the total allocated through the formula (£129,000).

### **Description of formula**

- 86 The formula consists of a number of factors applied to each school:
- (a) A basic amount per pupil, with different values for pupils in primary, KS3 and KS4.
  - (b) Deprivation factors based on measures of deprivation that are linked to low educational attainment.
  - (c) English as an Additional Language, which provides funding for pupils recorded as having English as an additional language in the past three years.
  - (d) Mobility, which provides additional funding to schools with a history of significant changes in pupil numbers during the academic year.
  - (e) Low Prior Attainment, for pupils who have not reached the expected standard in their previous phase of education.
  - (f) A lump sum per school, to ensure that schools with smaller numbers of pupils have a minimum amount of funding to recognise that they need a headteacher and administrative and caretaking provision.
  - (g) A sparsity factor, to provide an additional lump sum to small schools in sparsely populated areas.
  - (h) Premises-related factors in respect of non-domestic rates and split-site schools.

- (i) A factor to fund the affordability gap for schools built and maintained by a PFI contractor under the Building Schools for the Future programme.
  - (j) An exceptional factor for a secondary school which shares facilities with a leisure centre.
  - (k) The Minimum Per Pupil Funding factor.
- 87 A summary of the 2020-21 formula is included in Appendix 3 and a summary of funding per school, including a comparison with funding for the current financial year is included in Appendix 4.

### **Equality Impact Assessment**

- 88 An Equality Impact Assessment has been completed and is attached at Appendix 5. In summary, with the exception of age, the formula does not differentiate according to any of the protected characteristics from an Equality Act perspective.
- 89 The differentiation in respect of age is in accordance with the factor values attached to each key stage in the education lifecycle, which is common practice and a key feature of the existing local formula across the country and the NFF, and recognises differences in the provision required by pupils of different ages.
- 90 There is a small positive impact in relation to disability as the transitional formula will increase the proportion of funding allocated to Low Prior Attainment (LPA), which is one of the DfE's proxy indicators for Special Educational Needs (SEN).
- 91 Faith schools receive less funding per pupil, on average, compared to non-faith schools. However, it should be noted that the formula does not differentiate between schools in terms of religion but does take account of additional needs in calculating allocations. A comparison of faith and non-faith schools supports a view that differences between these types of school is a result of differences in the proportion of pupils who are eligible for additional needs funding.
- 92 Where funding reduces from year-to-year schools will continue to be supported to understand the implications, to forecast any budget shortfall and to identify appropriate savings that can be made to balance the budget. Where a staff restructuring is necessary schools will also continue to be supported through this process.

## High Needs Block

- 93 There are enduring pressures on High Needs Block (HNB) of the Dedicated Schools Grant (DSG) which provides funding for SEND and inclusion support services for children and young people in County Durham.
- 94 A combination of ongoing austerity across the public sector, implementation of the SEND Reforms (2014), which has increased support to cover children and young people from birth up to 25 years of age, and changing customer needs which are becoming more complex, means that there are insufficient resources to support children and young people with SEND and inclusion needs. This position is replicated in other local authorities And the Council has continued to feedback to the Government on spending pressures and request additional government funding for these services and local schools.
- 95 The current forecast means that expenditure is likely to exceed the High Needs DSG allocation by £9.3 million in 2019-20 (19% higher than the HNB grant received in 2019-20). The Government has confirmed a significant increase in HNB grant for County Durham of £8.4 million for 2020-21 and in view of this the forecast HNB overspend for 2020-21 is now around £2 million.
- 96 There is a growing deficit in the DSG account due to overspends on the HNB in recent years. The DfE now require a report from any local authority that has a cumulative DSG deficit of more than 1% of their overall DSG allocation at the end of the financial year. For Durham this equates to £3.9 million. The latest forecast of the overall DSG deficit position at the end of the year is £4.4 million (£6.4 million relating to the HNB minus £2 million of other non-HNB DSG reserves). This means that the authority will need to produce a recovery plan for submission to the DfE.
- 97 Despite the increase in Government HNB funding available for 2020-21, forecasts show there remains insufficient resources to support predicted HNB expenditure in future years, and to bring the HNB deficit back into balance. To address this a five-year financial strategy is proposed with continued work on the HNB sustainability plan following the recent consultation period.
- 98 Key elements of the sustainability plan work relate to the following areas which were subject to consultation after the last report to cabinet in July 2019:
- Centrally Managed Services
  - Special Schools

- Top up Funding
  - Targeted Funding
  - Post 16 Funding
  - Funding support to Partnerships of Schools
  - Joint commissioning of therapies
  - Joint commissioning of equipment, aids and adaptations
  - Alternative Provision (AP) and the Pupil Referral Unit (PRU)
- 99 Following Cabinet approval on 10 July 2019, the Council publicly consulted on outline proposals for the above areas of review, over three months between 17 July and 17 October 2019.
- 100 The majority of respondents to the consultation were in favour of the Council adopting the following overall commitments and all but one of the proposals associated with the above nine areas of review:
- (a) To collectively support an education system within County Durham where inclusion of children and young people in their local schools is the norm, giving parents and carers confidence that their children's needs will be understood and met.
  - (b) To offer a range of specialist learning provisions for some young people who have a high level of needs.
  - (c) To make every effort to use all of the resources available to young people effectively and efficiently and to maintain spending within funding limits wherever possible.
- 101 The outcomes of the public consultation and related consultation conducted with all schools on the options for reducing future HNB expenditure are detailed within the report to be presented to Cabinet on 15 January 2020. Subject to cabinet approval, it is proposed that the SEND and Inclusion Resources Board oversee the implementation of the work programme to deliver the proposed changes as set out in paragraphs 80 to 140 of the report and update on progress to Cabinet in Summer 2020.

## **Conclusion**

- 102 This report set out details of new information about funding for the mainstream primary and secondary funding formula for next year

(2020-21) and changes to the regulations in respect of the setting of local formulas, as published on 11 October 2019.

- 103 There continue to be significant pressures on the budget for SEND. Additional funding is being provided this year through the HNB of the Dedicated Schools Grant, but whilst this will reduce the pressures on this budget, it is insufficient to resolve them and a review of provision has been undertaken, which has resulted in a five-year financial strategy to address this.

### **Background papers**

- Cabinet report, 11 December 2019

*Mainstream Primary and Secondary Formula Funding 2020-21*

- Schools Forum report, 25 November 2019

*Mainstream Primary and Secondary Formula Funding 2020-21*

### **Other useful documents**

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## **Appendix 1: Implications**

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### **Legal Implications**

Schools are largely funded by Dedicated Schools Grant (DSG).

The Dedicated Schools Grant is issued by the Department for Education, with the terms of grant given governed by section 16 of the Education Act 2002, which states that it is a ring-fenced specific grant that must be used in support of the schools budget as defined in the School and Early Years Finance (England) Regulations.

Local authorities are currently responsible for establishing a local formula for distributing the funding to individual schools. This is subject to national regulations and statutory restrictions established by the Education and Skills Funding Agency.

Since 2013-14, local discretion over the funding formulae that can be applied has been significantly restricted, with local decision making limited to the application of a relatively small number of formula factors, most of which are pupil-led, with the rest being either school-led or relating to specific premises related costs.

The funding framework governing schools finance, which replaced Local Management of Schools, is based on the legislative provisions in sections 45-53 of the School Standards and Framework Act 1998. Under this legislation, the council is required to publish a Scheme of Financing for Schools.

The scheme sets out the financial relationship between the authority and the maintained schools that it funds, including the respective roles and responsibilities of the authority and schools. Under the scheme, deficits of expenditure against budget share (formula funding and other income due to the school) in any financial year are charged against the school and deducted from the following year's budget share to establish the funding available to the school for the coming year.

The Council is restricted by legislation from allocating funding to a particular mainstream school as its funding must come from the local formula.

### **Finance**

The Dedicated Schools Grant (DSG) is a specific earmarked grant provided by the Government which provides the major source of funding for schools and the provision of support to them. It is notionally split into four 'blocks': Early Years, High Needs Central School Services and Schools.

All DSG funding must be spent on schools or support to them.

Starting in 2018-19, funding allocations to each local authority's Schools Block of the DSG are based on notional funding for each school using the National Funding Formula, which is determined by the DfE. Individual local authorities use the Schools Block funding to set a local formula using the available funding and in accordance with funding regulations, which limit the discretion of authorities.

Local authorities will continue to set local formulas until at least 2020-21. DfE policy is that in the longer term local formulas will be replaced by the NFF, which will determine allocations to individual schools. The Government are encouraging local authorities to align their local formula with the NFF.

The NFF puts more funding into pupil-led factors than school-led factors, which could create longer-term challenges for smaller schools, because the increase in pupil-led funding will be of less benefit to schools with smaller numbers of pupils. The NFF will include minimum funding levels which may reduce the amount that can be allocated through factors such as deprivation.

## **Consultation**

The Council must consult with schools and the Schools Forum before setting its local funding formula for mainstream schools. The latter is a statutory consultative body, mainly consisting of representatives of head teachers, governors and academy trusts, plus Trade Unions.

The Schools Forum received reports about these issues in September and October and considered the proposed formula at its meeting on 25 November 2019. Forum papers are published on the council's website and schools are notified of this through the council's website.

## **Equality and Diversity / Public Sector Equality Duty**

An Equality Impact Assessment has been completed and is attached at Appendix 5. In summary, with the exception of age, the formula does not differentiate according to any of the protected characteristics from an Equality Act perspective.

The differentiation in respect of age is in accordance with the factor values attached to each key stage in the education lifecycle, which is common practice and a key feature of the existing local formula across the country and the NFF, and recognises differences in the provision required by pupils of different ages.

There is a small positive impact in relation to disability as the transitional formula will increase the proportion of funding allocated to Low Prior Attainment (LPA), which is one of the DfE's proxy indicators for Special Educational Needs (SEN).

Faith schools receive less funding per pupil, on average, compared to non-faith schools. However, it should be noted that the formula does not differentiate between schools in terms of religion but does take account of additional needs in calculating allocations. A comparison of faith and non-faith schools supports a view that differences between these types of school is a result of differences in the proportion of pupils who are eligible for additional needs funding.

Where funding reduces from year-to-year schools will continue to be supported to understand the implications, to forecast any budget shortfall and to identify appropriate savings that can be made to balance the budget. Where a staff restructuring is necessary schools will also continue to be supported through this process.

### **Climate Change**

None

### **Human Rights**

None

### **Crime and Disorder**

None

### **Staffing**

There are likely to be consequential restructuring and potential redundancies in schools where funding is reduced.

### **Accommodation**

None

### **Risk**

The National Funding Formula increases the proportion of funding allocated on pupil based factors, by reducing the amounts of funding allocated through schools led factors such as lump sums.

The NFF also distributes deprivation linked funding differently to the previous local formula arrangements, with greater proportions of funding being distributed on the basis of low Prior Attainment. Small schools and those schools receiving a proportionately higher proportion of deprivation linked funding currently distributed via the existing local formula will face a greater financial challenge as a result of the move towards a National Funding Formula for schools.

The long-term policy of replacing local formulas with the NFF requires local authorities to consider the implications for schools when local formulas are replaced by the NFF.

There is a risk of significant turbulence for schools if there is a 'cliff-edge' change in funding when their funding changes to the NFF.

## **Procurement**

None

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## **Appendix 2: Consultation on Minimum Per Pupil Funding**

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***Question 1: Do you agree that, in order to calculate mandatory minimum per pupil funding levels, all local authorities should follow the NFF methodology? If not, please explain your reasons.***

Council response:

If the factor is to be mandatory, then a standard methodology would be appropriate. It would, however, be appropriate to allow local authorities to apply to vary the methodology where they identify that the methodology would result in unfair treatment for a school. Such applications should be considered individually and on their merits.

***Question 2: Do you agree that any requests from local authorities to disapply the use of the mandatory minimum per pupil levels should only be considered on an exceptional basis and in the context of the grounds described above? If not, please explain your reasons.***

Council response:

Requests should be considered on their merits and the DfE should not make any assumptions about the reasons why applications may be necessary, particularly when local authorities have only limited information about funding for next year, particularly units of funding.

***Question 3. Please provide any additional comments you wish to make on the implementation of mandatory minimum per pupil levels.***

Council response:

The proposal distorts the funding allocated through the NFF and is not accompanied by a satisfactory rationale.

The original consultation on the NFF set out the rationale for the additional pupil needs factors, in terms of evidence that pupils in these categories do not do as well as their peers and are likely to need additional support in school to achieve a good standard of education, over and above the standard provision funded the basic amount per pupil and lump sum.

The MPPF distorts this by giving additional funding to schools that a larger and have fewer pupils with additional needs:

- Larger schools have a lower amount of school-led funding per pupil because the lump sum is spread over more pupils. However, if the lump sum is intended to cover minimum fixed costs then there is no justification for increasing school-led funding per pupil above the funding provided in the lump sum.
- Schools with fewer pupils with additional needs receive less pupil-led funding per pupil because most of their pupil-led funding comes from the basic amount per pupil. However, if the pupils in these schools don't have additional needs then the schools shouldn't need the additional funding beyond the basic amount per pupil.

This proposal will divert funding away from smaller schools and those with greater additional needs. The council has modelled funding using the proposed mandatory values, which shows that MPPF funding favours schools with fewer pupils with additional needs:

<i>Average percentage of pupils eligible for additional pupil-led funding using the revised 2019-20 formula with 2.5% additional funding, £1.5m transferred to HNB and MFG = 0.5%</i>	All schools	Schools without MPPF funding	Schools with MPPF funding
% of pupil-led funding for additional needs	19.5%	20.2%	10.6%
% of pupils not eligible for IDACI funding	40.7%	38.0%	79.1%
IDACI F - least deprived	13.8%	14.2%	8.3%
IDACI E	14.3%	15.0%	5.0%
IDACI D	11.4%	12.0%	3.3%
IDACI C	7.0%	7.4%	1.8%
IDACI B	7.7%	8.1%	1.6%
IDACI A - most deprived	5.1%	5.4%	0.9%
FSM	22.5%	23.6%	7.3%
FSM6	31.2%	32.5%	12.2%
Low Prior Attainment	34.4%	35.1%	24.1%

If the Government's view is that schools need at least the MPPF values as a minimum level of funding, then a more appropriate response would be to increase the basic funding per pupil in the formula, whilst maintaining the additional pupil needs funding, so that all schools were adequately funded, and those with additional pupil needs were given additional funding to allow them to provide for these needs. The lump sum could be converted into a minimum amount of funding per school, so that very small schools still had sufficient funding to operate, and the sparsity factor could continue as a separate factor to recognise the unique needs of schools in sparsely populated areas.

No evidence has been provided in support of the MPPF to show that pupils in larger schools with fewer additional needs are adversely affected by current levels of funding.

***Question 4a: Do you think that any of our proposals could have a disproportionate impact, positive or negative, on specific pupils, in particular those who share a protected characteristic? Please provide evidence to support your response.***

Council response:

As already noted, the council's is concerned that the proposal distorts funding, because it favours schools with fewer pupils with additional needs. This is likely to affect pupils with protected characteristics, particularly disabilities.

The DfE's Equalities Impact Assessment for the National Funding Formula, published in December 2016, noted the strong correlation between Low Prior Attainment and SEN and between SEN and disability, which is why LPA is used in the High Needs National Funding Formula as well as the Schools NFF.

This means that using the MPPF will have a disproportionate impact on pupils with disabilities, because the MPPF increases funding for schools with fewer pupils eligible for Low Prior Attainment funding and does so at the expense of pupils who are eligible for LPA funding, because allocating funding through the MPPF reduces the funding that can be allocated through the rest of the NFF.

***Question 4b: How could any adverse consequences be reduced and are there any ways we could better advance equality of opportunity between***

***those pupils who share a relevant protected characteristic and those who do not? Please provide evidence to support your response.***

Council response:

Using a basic unit of funding that reflects the government's view of the minimum funding per pupil needed to provide a good basic education and having appropriate levels of additional needs funding to provide for these pupils' needs. Removing the distortion of the Minimum Per Pupil Funding factor would ensure that funding is targeted to where it is needed.

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**Appendix 3: Mainstream Formula Funding Factors 2020-21**

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**Children and Young People's Overview and Scrutiny Committee, 13 January 2019**  
**Mainstream Primary and Secondary School Funding Formula 2020-21 and High Needs Block, Appendix 3**

Formula factors, values and allocations		2019-20 formula						2020-21 formula					
		Pupils / eligible pupils	NFF values	Local formula values	Difference	Allocation through local formula		Pupils / eligible pupils	NFF values	Local formula values	Difference	Allocation through local formula	
			£	£	£	£		£	£	£	£	£	
Basic funding per pupil	Primary	39,117.67	2,746.99	2,803.14	56.15	109,652,000	35.84%	38,844.00	2,857.00	2,906.91	47.05	112,916,000	35.34%
	KS3	15,653.00	3,862.65	3,812.19	-50.46	59,672,000	19.51%	15,940.00	4,018.00	4,021.39	-0.57	64,101,000	20.06%
	KS4	9,588.00	4,385.81	4,716.10	330.29	45,218,000	14.78%	9,944.00	4,561.00	4,764.48	198.79	47,378,000	14.83%
Deprivation	Free School Meals Entitlement (Primary)	9,027.24	440.00	247.69	-192.31	2,236,000	0.73%	10,173.00	450.00	358.32	-92.04	3,645,000	1.14%
	Free School Meals Entitlement (Secondary)	4,778.00	440.00	1,630.23	1,190.23	7,789,000	2.55%	5,578.00	450.00	1,068.35	617.30	5,959,000	1.86%
	FSM6 (Primary)	12,133.26	540.00	303.98	-236.02	3,688,000	1.21%	12,231.95	560.00	443.72	-116.72	5,428,000	1.70%
	FSM6 (Secondary)	8,270.62	785.00	441.90	-343.10	3,655,000	1.19%	8,494.40	815.00	645.51	-170.12	5,483,000	1.72%
	IDACI Band F (Primary)	5,204.05	200.00	309.40	109.40	1,610,000	0.53%	5,157.03	210.00	266.75	56.49	1,376,000	0.43%
	IDACI Band E (Primary)	5,565.24	240.00	375.65	135.65	2,091,000	0.68%	5,495.82	250.00	321.32	71.00	1,766,000	0.55%
	IDACI Band D (Primary)	4,525.11	360.00	486.94	126.94	2,203,000	0.72%	4,476.86	375.00	442.67	67.24	1,982,000	0.62%
	IDACI Band C (Primary)	3,094.49	390.00	547.57	157.57	1,694,000	0.55%	3,138.03	405.00	489.21	83.73	1,535,000	0.48%
	IDACI Band B (Primary)	3,075.29	420.00	630.06	210.06	1,938,000	0.63%	3,062.66	435.00	546.99	111.45	1,675,000	0.52%
	IDACI Band A (Primary)	2,196.10	575.00	979.74	404.74	2,152,000	0.70%	2,175.10	600.00	811.31	210.51	1,765,000	0.55%
	IDACI Band F (Secondary)	3,199.83	290.00	333.52	43.52	1,067,000	0.35%	3,331.85	300.00	325.36	25.04	1,084,000	0.34%
	IDACI Band E (Secondary)	3,598.72	390.00	427.66	37.66	1,539,000	0.50%	3,672.36	405.00	427.63	22.21	1,570,000	0.49%
	IDACI Band D (Secondary)	2,837.61	515.00	535.86	20.86	1,521,000	0.50%	2,922.21	535.00	549.97	14.43	1,607,000	0.50%
	IDACI Band C (Secondary)	1,838.83	560.00	599.03	39.03	1,102,000	0.36%	1,879.09	580.00	605.52	24.93	1,138,000	0.36%
	IDACI Band B (Secondary)	1,893.82	600.00	678.31	78.31	1,285,000	0.42%	1,932.33	625.00	669.35	43.69	1,293,000	0.40%
IDACI Band A (Secondary)	1,273.91	810.00	1,023.56	213.56	1,304,000	0.43%	1,329.87	840.00	957.08	116.13	1,273,000	0.40%	
EAL	Primary	675.78	515.00	289.91	-225.09	196,000	0.06%	659.68	535.00	423.65	-111.76	279,000	0.09%
	Secondary	108.16	1,385.00	779.66	-605.34	84,000	0.03%	102.09	1,440.00	1,139.96	-301.16	116,000	0.04%
Mobility	Primary	337.58	1,385.00	-	-1,385.00	-	-	277.30	875.00	449.38	-426.06	125,000	0.04%
	Secondary	353.80	1,385.00	-	-1,385.00	-	-	7.18	1,250.00	641.97	-608.66	5,000	0.00%
LPA	Primary	14,223.08	1,022.00	700.11	-321.89	9,958,000	3.25%	12,242.69	1,065.00	906.52	-159.38	11,098,000	3.47%
	Secondary	4,678.50	1,550.00	1,032.31	-517.69	4,830,000	1.58%	4,931.00	1,610.00	1,357.02	-254.31	6,691,000	2.09%
Minimum per-pupil funding						13,000	0.00%					489,000	0.15%
<b>Total for pupil-led factors</b>						<b>266,496,000</b>	<b>87.11%</b>					<b>281,778,000</b>	<b>88.18%</b>
Lump sum	Primary	214.70	110,000.00	132,222.22	22,222.22	28,388,000	9.28%	213.40	114,400.00	123,311.11	8,911.11	26,315,000	8.23%
	Secondary	31.00	110,000.00	138,888.89	28,888.89	4,306,000	1.41%	31.00	114,400.00	126,644.44	12,244.44	3,926,000	1.23%
Sparsity						198,000	0.06%					260,000	0.08%
<b>Total for school-led factors</b>						<b>32,891,000</b>	<b>10.75%</b>					<b>30,500,000</b>	<b>9.54%</b>
Rates						4,776,000	1.56%					5,563,000	1.74%
Split-site						392,000	0.13%					434,000	0.14%
PFI						1,314,000	0.43%					1,215,000	0.38%
Exceptional - joint-use Leisure						60,000	0.02%					60,000	0.02%
<b>Total for premises factors</b>						<b>6,542,000</b>	<b>2.14%</b>					<b>7,271,000</b>	<b>2.28%</b>
<b>Total funding</b>						<b>305,929,000</b>	<b>100.00%</b>					<b>319,549,000</b>	<b>100.00%</b>

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**Appendix 4:**

**Mainstream Formula Funding 2020-21 – Impacts per School**

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**Children and Young People's Overview and Scrutiny Committee, 13 January 2019**  
**Mainstream Primary and Secondary School Funding Formula 2020-21 and High Needs Block, Appendix 4**

<i>Change in formula funding from 2019-20 to 2020-21. Funding is after MFG/capping, but before de-delegation. Funding for rates and PFI are excluded because these are budget neutral. Funding is rounded to nearest £1,000</i>			1920 NoR (pupils)	2021 NoR (pupils)	Change	19-20 formula funding	20-21 formula funding	Change in formula funding		19-20 formula funding per pupil	20-21 formula funding per pupil	Change in formula funding per pupil
<b>Totals</b>			<b>64,359</b>	<b>64,728</b>	<b>369</b>	<b>£299,839,000</b>	<b>£312,772,000</b>	<b>£12,933,000</b>				
2000	Ropery Walk	Primary	253	254	1	1,064,000	1,105,000	41,000	3.87%	4,205	4,350	145
2001	Middlestone Moor	Primary	260	264	4	1,046,000	1,119,000	73,000	6.94%	4,023	4,237	214
2002	Chilton	Primary	261	260	(1)	1,042,000	1,078,000	37,000	3.52%	3,991	4,148	156
2003	North Park	Primary	190	198	8	868,000	945,000	77,000	8.81%	4,571	4,772	202
2004	Seascape	Primary	240	229	(11)	1,190,000	1,173,000	(16,000)	-1.38%	4,958	5,124	166
2005	Pelton	Primary	284	285	1	1,168,000	1,225,000	57,000	4.84%	4,112	4,297	184
2008	Acre Rigg	Primary	256	265	9	1,132,000	1,201,000	69,000	6.08%	4,421	4,531	110
2009	Victoria Lane	Primary	159	165	6	744,000	786,000	41,000	5.53%	4,682	4,761	79
2010	Stephenson Way	Primary	293	295	2	1,282,000	1,362,000	81,000	6.28%	4,375	4,618	243
2015	Brownney	Primary	137	142	5	583,000	613,000	29,000	5.05%	4,258	4,315	57
2016	Rosa Street	Primary	178	161	(17)	782,000	755,000	(28,000)	-3.53%	4,395	4,688	293
2017	Shield Row	Primary	170	162	(8)	745,000	728,000	(17,000)	-2.25%	4,381	4,494	113
2018	Dene House	Primary	275	266	(9)	1,218,000	1,222,000	4,000	0.30%	4,431	4,594	164
2019	South Hetton	Primary	201	210	9	864,000	937,000	73,000	8.41%	4,300	4,462	162
2020	St. Joseph's RC, N/A	Primary	127	124	(3)	602,000	609,000	7,000	1.15%	4,739	4,909	170
2021	Sacrison	Primary	197	194	(3)	841,000	865,000	24,000	2.81%	4,271	4,459	188
2022	Bishop Ian Ramsey CE	Primary	193	174	(19)	751,000	715,000	(35,000)	-4.73%	3,890	4,110	221
2023	New Seaham	Primary	263	259	(4)	994,000	997,000	3,000	0.31%	3,779	3,849	70
2043	Westlea	Primary	228	236	8	1,000,000	1,073,000	73,000	7.35%	4,384	4,547	163
2105	Edmondsley	Primary	164	162	(2)	676,000	687,000	11,000	1.69%	4,122	4,243	122
2107	Lumley Jun.	Primary	157	164	7	652,000	683,000	31,000	4.78%	4,152	4,165	13
2108	Lumley Inf.	Primary	146	134	(12)	600,000	577,000	(24,000)	-3.92%	4,111	4,303	192
2114	West Pelton	Primary	65	63	(2)	380,000	381,000	1,000	0.28%	5,849	6,051	203
2116	Nettlesworth	Primary	89	101	12	437,000	490,000	52,000	11.99%	4,914	4,850	(65)
2125	Red Rose	Primary	281	285	4	1,008,000	1,069,000	61,000	6.05%	3,585	3,750	165
2126	Woodlea	Primary	200	199	(1)	802,000	821,000	20,000	2.45%	4,009	4,128	119
2133	Cestria	Primary	415	408	(7)	1,479,000	1,530,000	51,000	3.42%	3,565	3,750	185
2136	Ouston	Primary	253	248	(5)	947,000	958,000	11,000	1.20%	3,743	3,864	121
2146	Bournmoor	Primary	110	111	1	506,000	522,000	16,000	3.23%	4,601	4,707	106
2185	Cotherstone	Primary	50	50	-	303,000	306,000	2,000	0.81%	6,066	6,115	49
2205	Beamish	Primary	69	66	(3)	397,000	391,000	(5,000)	-1.29%	5,747	5,931	184
2208	Collierley	Primary	143	133	(10)	633,000	610,000	(23,000)	-3.66%	4,428	4,586	159
2210	Catchgate	Primary	233	226	(7)	1,020,000	1,040,000	20,000	1.96%	4,377	4,602	224

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2212	Annfield Plain Jun.	Primary	138	136	(2)	630,000	653,000	24,000	3.77%	4,563	4,805	242
2213	Annfield Plain Inf.	Primary	117	105	(12)	563,000	533,000	(30,000)	-5.33%	4,812	5,076	264
2217	East Stanley	Primary	221	211	(10)	945,000	927,000	(18,000)	-1.89%	4,276	4,394	118
2225	South Stanley Inf.	Primary	124	111	(13)	602,000	572,000	(30,000)	-4.95%	4,855	5,155	300
2226	South Stanley Jun.	Primary	182	163	(19)	857,000	802,000	(55,000)	-6.46%	4,708	4,917	209
2232	Burnside	Primary	199	175	(24)	916,000	844,000	(73,000)	-7.93%	4,605	4,822	216
2233	Bloemfontein	Primary	163	173	10	748,000	821,000	73,000	9.79%	4,589	4,747	158
2234	Burnopfield	Primary	364	358	(6)	1,332,000	1,367,000	35,000	2.64%	3,659	3,818	159
2257	Shotley Bridge	Primary	384	390	6	1,403,000	1,513,000	110,000	7.84%	3,654	3,880	226
2259	Leadgate	Primary	175	186	11	810,000	899,000	89,000	10.94%	4,630	4,833	203
2261	Burnhope	Primary	74	84	10	405,000	450,000	45,000	11.18%	5,473	5,361	(113)
2266	Castleside	Primary	122	103	(19)	540,000	482,000	(58,000)	-10.76%	4,426	4,678	252
2269	The Grove	Primary	160	180	20	696,000	802,000	105,000	15.14%	4,351	4,454	102
2272	Delves Lane	Primary	297	298	1	1,160,000	1,217,000	56,000	4.87%	3,907	4,083	176
2276	Moorside	Primary	107	103	(4)	535,000	539,000	3,000	0.58%	5,005	5,229	224
2277	Consett Jun.	Primary	203	220	17	820,000	921,000	101,000	12.28%	4,040	4,185	146
2278	Consett Inf.	Primary	158	162	4	656,000	698,000	42,000	6.37%	4,152	4,307	155
2301	Hamsterley	Primary	40	37	(3)	272,000	266,000	(6,000)	-2.24%	6,798	7,185	387
2302	Hunwick	Primary	158	148	(10)	648,000	625,000	(23,000)	-3.52%	4,101	4,224	123
2307	Tow Law	Primary	103	96	(7)	526,000	522,000	(4,000)	-0.76%	5,104	5,434	331
2308	Crook	Primary	371	363	(8)	1,522,000	1,550,000	28,000	1.86%	4,103	4,271	168
2310	Hartside	Primary	211	210	(1)	880,000	890,000	10,000	1.18%	4,170	4,240	69
2311	Peases West	Primary	89	92	3	457,000	488,000	32,000	6.92%	5,130	5,306	176
2313	Stanley (Crook)	Primary	138	132	(6)	613,000	599,000	(14,000)	-2.22%	4,441	4,540	99
2316	Sunnybrow	Primary	87	65	(22)	486,000	400,000	(86,000)	-17.69%	5,585	6,153	568
2318	Howden-le-Wear	Primary	136	148	12	599,000	655,000	56,000	9.38%	4,403	4,429	25
2319	Frosterley	Primary	43	41	(2)	289,000	291,000	2,000	0.65%	6,718	7,091	373
2321	Rookhope	Primary	8	9	1	185,000	191,000	6,000	3.15%	23,185	21,257	(1,928)
2322	St. John's Chapel	Primary	13	12	(1)	193,000	190,000	(3,000)	-1.70%	14,834	15,797	963
2324	Wearhead	Primary	23	23	-	219,000	220,000	1,000	0.41%	9,519	9,559	39
2326	Willington	Primary	200	198	(2)	932,000	948,000	16,000	1.76%	4,659	4,788	130
2328	Witton-le-Wear	Primary	94	96	2	434,000	444,000	10,000	2.38%	4,616	4,627	11
2329	Wolsingham	Primary	192	174	(18)	734,000	696,000	(38,000)	-5.17%	3,822	4,000	177

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2330	Oakley Cross	Primary	144	130	(14)	674,000	626,000	(48,000)	-7.06%	4,679	4,817	138
2351	Byers Green	Primary	87	86	(1)	426,000	429,000	4,000	0.89%	4,892	4,993	101
2357	Bluebell Meadow	Primary	280	230	(50)	1,189,000	1,053,000	(136,000)	-11.42%	4,247	4,580	333
2361	Kirk Merrington	Primary	127	138	11	549,000	595,000	46,000	8.35%	4,326	4,313	(12)
2362	Cassop	Primary	143	145	2	618,000	640,000	22,000	3.49%	4,323	4,412	89
2368	Ferryhill Station	Primary	74	78	4	415,000	445,000	30,000	7.34%	5,608	5,710	103
2370	West Cornforth	Primary	168	172	4	790,000	820,000	30,000	3.83%	4,704	4,770	66
2372	Coxhoe	Primary	311	314	3	1,149,000	1,206,000	58,000	5.02%	3,693	3,842	148
2374	Kelloe	Primary	98	94	(4)	497,000	495,000	(1,000)	-0.27%	5,067	5,268	201
2379	Tudhoe Colliery	Primary	199	202	3	818,000	852,000	34,000	4.16%	4,112	4,220	108
2385	Dean Bank	Primary	157	149	(8)	780,000	776,000	(3,000)	-0.41%	4,966	5,211	245
2388	Bowburn	Primary	325	306	(19)	1,419,000	1,412,000	(7,000)	-0.49%	4,365	4,613	248
2394	Ox Close	Primary	291	296	5	1,125,000	1,178,000	52,000	4.63%	3,867	3,978	111
2397	Cleves Cross	Primary	210	212	2	877,000	916,000	39,000	4.42%	4,175	4,319	144
2399	Fishburn	Primary	156	138	(18)	634,000	603,000	(31,000)	-4.86%	4,061	4,368	307
2400	Broom Cottages	Primary	264	246	(18)	1,153,000	1,110,000	(42,000)	-3.68%	4,367	4,513	147
2401	Etherley Lane	Primary	300	265	(35)	1,177,000	1,084,000	(93,000)	-7.91%	3,924	4,091	167
2409	Ramshaw	Primary	69	66	(3)	372,000	367,000	(6,000)	-1.51%	5,397	5,556	160
2410	Forest-of-Teesdale	Primary	6	6	-	174,000	175,000	-	0.21%	29,049	29,109	61
2411	Aycliffe Village	Primary	153	160	7	640,000	683,000	43,000	6.76%	4,183	4,271	87
2413	Butterknowle	Primary	39	41	2	284,000	294,000	10,000	3.60%	7,284	7,178	(106)
2417	Escomb	Primary	202	206	4	810,000	848,000	38,000	4.73%	4,008	4,116	108
2419	St. Helens Auckland	Primary	167	164	(3)	752,000	767,000	15,000	2.00%	4,501	4,675	174
2423	Thornhill	Primary	210	207	(3)	897,000	909,000	12,000	1.34%	4,273	4,393	120
2426	Toft Hill	Primary	202	193	(9)	791,000	770,000	(21,000)	-2.63%	3,914	3,988	75
2428	Woodland	Primary	34	30	(4)	254,000	240,000	(14,000)	-5.53%	7,479	8,007	529
2430	Middleton-in -Teesdale	Primary	117	108	(9)	500,000	489,000	(11,000)	-2.18%	4,273	4,529	255
2433	Cockton Hill Jun.	Primary	206	208	2	915,000	943,000	28,000	3.07%	4,443	4,536	92
2434	Cockton Hill Inf.	Primary	158	140	(18)	726,000	688,000	(38,000)	-5.20%	4,597	4,918	321
2438	Timothy Hackworth	Primary	370	387	17	1,529,000	1,685,000	156,000	10.21%	4,132	4,354	222
2440	Cockfield	Primary	103	102	(1)	497,000	502,000	5,000	1.07%	4,822	4,921	99
2442	Montalbo	Primary	157	169	12	618,000	674,000	56,000	9.10%	3,940	3,987	47
2453	New Brancepeth	Primary	110	108	(2)	501,000	513,000	11,000	2.29%	4,557	4,748	191

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2455	Langley Moor	Primary	197	205	8	756,000	810,000	53,000	7.06%	3,839	3,949	111
2462	Witton Gilbert	Primary	203	200	(3)	808,000	830,000	22,000	2.66%	3,983	4,150	167
2470	Pittington	Primary	193	197	4	741,000	779,000	38,000	5.07%	3,840	3,952	113
2472	Ludworth	Primary	72	86	14	398,000	462,000	64,000	16.13%	5,528	5,375	(153)
2473	Sherburn	Primary	162	155	(7)	709,000	703,000	(5,000)	-0.77%	4,374	4,537	162
2475	West Rainton	Primary	126	120	(6)	614,000	610,000	(4,000)	-0.65%	4,871	5,081	210
2477	Bearpark	Primary	108	109	1	528,000	546,000	19,000	3.52%	4,887	5,013	125
2481	Neville's Cross	Primary	277	296	19	1,001,000	1,110,000	109,000	10.87%	3,614	3,750	136
2488	Newton Hall Inf.	Primary	166	163	(3)	624,000	645,000	22,000	3.46%	3,756	3,958	201
2497	Esh Winning	Primary	234	238	4	969,000	1,021,000	52,000	5.34%	4,142	4,290	148
2498	Cheveley Park	Primary	206	208	2	794,000	823,000	30,000	3.74%	3,853	3,959	106
2499	Laurel Avenue	Primary	93	102	9	506,000	567,000	60,000	11.94%	5,443	5,555	112
2509	Hesleden	Primary	106	99	(7)	476,000	457,000	(19,000)	-4.01%	4,495	4,620	125
2516	Deaf Hill	Primary	130	144	14	629,000	718,000	89,000	14.20%	4,835	4,985	150
2523	Thornley	Primary	182	170	(12)	800,000	777,000	(23,000)	-2.83%	4,395	4,572	177
2526	Wheatley Hill	Primary	196	256	60	888,000	1,164,000	276,000	31.03%	4,532	4,546	15
2531	Wingate Primary	Primary	357	370	13	1,481,000	1,493,000	12,000	0.84%	4,147	4,035	(112)
2532	Horden Cotsford	Primary	174	151	(23)	971,000	850,000	(121,000)	-12.47%	5,578	5,626	48
2536	Shotton	Primary	303	278	(25)	1,269,000	1,223,000	(47,000)	-3.68%	4,189	4,398	209
2540	Acre Rigg Inf.	Primary	192	191	(1)	857,000	882,000	25,000	2.90%	4,466	4,620	153
2563	Sedgefield	Primary	206	198	(8)	762,000	766,000	4,000	0.53%	3,698	3,868	170
2593	Hardwick	Primary	211	214	3	773,000	808,000	35,000	4.51%	3,665	3,777	112
2704	Copeland Road	Primary	143	151	8	642,000	688,000	46,000	7.18%	4,491	4,559	67
2705	St. Andrew's	Primary	131	135	4	643,000	693,000	49,000	7.66%	4,912	5,131	219
2706	Byerley Park	Primary	211	208	(3)	824,000	833,000	9,000	1.12%	3,905	4,006	101
2708	Horndale Inf.	Primary	95	89	(6)	487,000	485,000	(2,000)	-0.36%	5,124	5,450	326
2729	Langley Park	Primary	150	150	-	649,000	680,000	31,000	4.72%	4,328	4,532	204
2733	Yohden	Primary	159	171	12	746,000	808,000	62,000	8.37%	4,691	4,727	36
2734	Howletch Lane	Primary	374	368	(6)	1,479,000	1,507,000	29,000	1.94%	3,953	4,096	142
2737	Blackhall	Primary	221	236	15	946,000	1,032,000	86,000	9.10%	4,279	4,372	93
2742	Vane Road	Primary	389	398	9	1,466,000	1,550,000	83,000	5.69%	3,769	3,893	124
2743	Sugar Hill	Primary	406	407	1	1,525,000	1,589,000	65,000	4.24%	3,755	3,905	149
2744	Pelton Roseberry	Primary	184	202	18	779,000	886,000	107,000	13.70%	4,236	4,387	151

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2745	Bullion Lane	Primary	259	249	(10)	1,164,000	1,167,000	3,000	0.25%	4,495	4,688	192
2746	Easington Colliery	Primary	521	515	(6)	2,117,000	2,189,000	72,000	3.38%	4,064	4,250	186
2747	Gilesgate	Primary	165	146	(19)	779,000	736,000	(43,000)	-5.56%	4,723	5,041	318
2748	Finchale	Primary	209	211	2	778,000	803,000	24,000	3.11%	3,724	3,803	80
2749	Benfieldside	Primary	224	206	(18)	923,000	904,000	(18,000)	-2.00%	4,120	4,391	270
2750	King Street	Primary	212	204	(8)	907,000	900,000	(7,000)	-0.74%	4,277	4,412	135
2751	Framwellgate Moor	Primary	237	242	5	891,000	936,000	45,000	5.02%	3,766	3,869	103
2943	Newker	Primary	404	381	(23)	1,480,000	1,458,000	(22,000)	-1.46%	3,664	3,828	164
3031	Chester-le-Street CE	Primary	313	286	(27)	1,214,000	1,168,000	(46,000)	-3.76%	3,878	4,085	207
3063	Ebchester CE	Primary	87	89	2	420,000	435,000	15,000	3.67%	4,822	4,887	65
3085	St. Stephen's CE	Primary	196	196	-	861,000	881,000	20,000	2.36%	4,391	4,494	104
3087	Stanhope Barrington CE	Primary	135	136	1	558,000	576,000	18,000	3.24%	4,136	4,239	102
3121	Green Lane CE	Primary	226	221	(5)	833,000	855,000	22,000	2.69%	3,685	3,870	185
3123	St. Anne's CE	Primary	214	216	2	841,000	873,000	32,000	3.81%	3,932	4,044	112
3130	Evenwood CE	Primary	84	83	(1)	441,000	449,000	8,000	1.76%	5,250	5,406	157
3131	Gainford CE	Primary	73	66	(7)	378,000	362,000	(16,000)	-4.29%	5,182	5,486	304
3134	Ingleton CE	Primary	58	57	(1)	323,000	327,000	4,000	1.21%	5,577	5,743	166
3141	Staindrop CE	Primary	170	167	(3)	673,000	680,000	7,000	1.10%	3,959	4,075	116
3161	Belmont CE	Primary	273	272	(1)	1,006,000	1,024,000	18,000	1.81%	3,684	3,764	80
3165	St. Oswald's CE	Primary	132	139	7	549,000	588,000	39,000	7.06%	4,159	4,229	69
3167	Shincliffe CE	Primary	201	203	2	758,000	782,000	24,000	3.11%	3,772	3,851	79
3168	St. Margaret's CE	Primary	415	420	5	1,370,000	1,575,000	206,000	15.01%	3,300	3,750	450
3182	Easington CE	Primary	129	132	3	548,000	570,000	22,000	4.10%	4,245	4,319	74
3183	Hutton Henry CE	Primary	71	77	6	385,000	411,000	25,000	6.61%	5,424	5,332	(92)
3213	Lanchester EP	Primary	347	365	18	1,269,000	1,369,000	100,000	7.89%	3,656	3,750	94
3300	St. Cuthbert's RC, New Seaham	Primary	197	197	-	782,000	805,000	22,000	2.82%	3,972	4,084	112
3301	St. Mary Magdalen RC	Primary	290	292	2	1,103,000	1,124,000	21,000	1.93%	3,803	3,850	47
3303	Bowes Hutchinson CE	Primary	49	58	9	301,000	336,000	35,000	11.65%	6,141	5,792	(348)
3343	St. Cuthbert's RC, Ch-le-St	Primary	201	202	1	769,000	793,000	24,000	3.16%	3,827	3,928	102
3344	St. Bede's RC, Sacriston	Primary	93	102	9	438,000	481,000	42,000	9.69%	4,713	4,714	1
3346	St. Benet's RC	Primary	217	208	(9)	806,000	796,000	(10,000)	-1.19%	3,712	3,827	114
3381	St. Joseph's RC, Stanley	Primary	210	208	(2)	865,000	873,000	9,000	0.99%	4,117	4,198	81
3382	St. Patrick's RC, Dipton	Primary	162	163	1	709,000	733,000	24,000	3.42%	4,374	4,496	122

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3384	St. Mary's RC, South Moor	Primary	133	132	(1)	648,000	661,000	13,000	1.99%	4,875	5,010	135
3401	St. Mary's RC , Blackhill	Primary	210	205	(5)	822,000	832,000	10,000	1.22%	3,913	4,057	144
3403	St. Pius X RC	Primary	95	96	1	459,000	466,000	7,000	1.63%	4,828	4,856	28
3404	St. Patrick's RC, Consett	Primary	384	376	(8)	1,364,000	1,410,000	46,000	3.34%	3,553	3,750	197
3406	Esh CE	Primary	96	98	2	438,000	449,000	10,000	2.36%	4,567	4,579	12
3407	St. Michael's RC, Esh Laude	Primary	182	183	1	711,000	730,000	19,000	2.65%	3,909	3,990	81
3409	Our Lady & St. Joseph's RC	Primary	117	108	(9)	548,000	527,000	(21,000)	-3.88%	4,685	4,879	194
3413	All Saints' RC	Primary	170	179	9	680,000	721,000	41,000	5.99%	4,002	4,028	26
3421	St. Cuthbert's RC, Crook	Primary	181	173	(8)	780,000	771,000	(9,000)	-1.17%	4,310	4,456	146
3425	Our Lady & St. Thomas RC	Primary	117	122	5	531,000	553,000	22,000	4.22%	4,537	4,535	(2)
3441	St. Michael's CE	Primary	123	118	(5)	521,000	513,000	(8,000)	-1.55%	4,239	4,350	111
3442	St. Williams RC	Primary	127	136	9	551,000	590,000	39,000	7.13%	4,339	4,340	2
3444	St. Charles' RC, Tudhoe	Primary	207	210	3	838,000	876,000	38,000	4.49%	4,050	4,171	121
3461	St. Mary's RC, Barnard Castle	Primary	100	97	(3)	441,000	435,000	(6,000)	-1.34%	4,406	4,481	75
3462	St. Wilfrid's RC	Primary	203	206	3	927,000	984,000	57,000	6.19%	4,567	4,779	212
3465	St. Chad's RC	Primary	96	95	(1)	453,000	456,000	2,000	0.53%	4,724	4,799	75
3469	St. Joseph's RC, Coundon	Primary	114	110	(4)	564,000	559,000	(5,000)	-0.95%	4,947	5,078	131
3470	St. Mary's RC, N/A	Primary	199	186	(13)	825,000	816,000	(10,000)	-1.16%	4,146	4,385	239
3472	St. Francis CE Jun.	Primary	132	138	6	632,000	683,000	51,000	8.15%	4,785	4,950	165
3481	St. Patrick's RC, Langley Moor	Primary	90	85	(5)	418,000	405,000	(13,000)	-3.14%	4,644	4,763	119
3483	Our Lady Queen of Martyrs' RC	Primary	89	89	-	431,000	436,000	5,000	1.13%	4,840	4,895	55
3485	St. Hild's College CE	Primary	165	156	(9)	750,000	743,000	(7,000)	-0.98%	4,545	4,760	215
3486	St. Godric's RC, Durham	Primary	212	212	-	769,000	795,000	26,000	3.32%	3,630	3,750	120
3488	St. Joseph's RC, Ushaw Moor	Primary	100	97	(3)	481,000	482,000	1,000	0.24%	4,811	4,971	160
3489	St. Joseph's RC, Durham	Primary	132	132	-	605,000	621,000	16,000	2.63%	4,581	4,702	121
3491	Blue Coat CE Jun.	Primary	251	247	(4)	893,000	926,000	33,000	3.70%	3,559	3,750	191
3492	St. Thomas More RC	Primary	95	86	(9)	422,000	397,000	(25,000)	-5.96%	4,447	4,619	173
3501	St. Joseph's RC, Murton	Primary	155	156	1	664,000	685,000	21,000	3.15%	4,284	4,391	107
3502	St. Godric's RC, Thornley	Primary	87	87	-	444,000	450,000	5,000	1.17%	5,108	5,168	60
3504	Our Lady of Lourdes RC	Primary	166	171	5	701,000	731,000	30,000	4.31%	4,224	4,277	53
3505	St. Mary's RC, Wingate	Primary	58	52	(6)	350,000	329,000	(21,000)	-6.02%	6,032	6,323	291
3506	St. Joseph's RC, Blackhall	Primary	76	68	(8)	396,000	371,000	(26,000)	-6.53%	5,216	5,449	233
3507	Our Lady Star of the Sea RC	Primary	113	104	(9)	578,000	561,000	(18,000)	-3.04%	5,117	5,391	274

**Children and Young People's Overview and Scrutiny Committee, 13 January 2019**  
**Mainstream Primary and Secondary School Funding Formula 2020-21 and High Needs Block, Appendix 4**

<i>Change in formula funding from 2019-20 to 2020-21. Funding is after MFG/capping, but before de-delegation. Funding for rates and PFI are excluded because these are budget neutral. Funding is rounded to nearest £1,000</i>			1920 NoR (pupils)	2021 NoR (pupils)	Change	19-20 formula funding	20-21 formula funding	Change in formula funding		19-20 formula funding per pupil	20-21 formula funding per pupil	Change in formula funding per pupil
<b>Totals</b>			<b>64,359</b>	<b>64,728</b>	<b>369</b>	<b>£299,839,000</b>	<b>£312,772,000</b>	<b>£12,933,000</b>				
3510	Our Lady of the Rosary RC	Primary	267	253	(14)	1,130,000	1,126,000	(4,000)	-0.38%	4,232	4,449	217
3511	Blessed John Duckett RC	Primary	56	62	6	345,000	371,000	27,000	7.71%	6,154	5,987	(167)
3513	St. John's CE Shildon	Primary	209	207	(2)	979,000	982,000	3,000	0.34%	4,682	4,743	61
3516	Prince Bishops	Primary	177	179	2	849,000	877,000	28,000	3.28%	4,796	4,898	102
3517	Ribbon	Primary	503	505	2	1,958,000	2,067,000	109,000	5.58%	3,892	4,092	201
3518	Woodham Burn	Primary	231	229	(2)	993,000	1,029,000	36,000	3.66%	4,298	4,494	196
3519	Silver Tree	Primary	176	171	(5)	773,000	783,000	10,000	1.29%	4,393	4,580	187
3520	Seaview	Primary	296	308	12	1,347,000	1,458,000	111,000	8.23%	4,550	4,733	183
3522	Tanfield Lea	Primary	297	322	25	1,162,000	1,294,000	133,000	11.43%	3,911	4,020	109
3523	Woodhouse	Primary	196	196	-	968,000	1,001,000	33,000	3.43%	4,940	5,109	170
3524	Seaham Trinity	Primary	384	387	3	1,539,000	1,610,000	71,000	4.61%	4,009	4,161	152
3525	Brandon	Primary	266	258	(8)	1,055,000	1,071,000	16,000	1.51%	3,966	4,150	185
3526	Greenland	Primary	338	343	5	1,418,000	1,483,000	64,000	4.52%	4,197	4,322	126
3527	Shotton Hall	Primary	345	349	4	1,340,000	1,404,000	65,000	4.82%	3,883	4,023	140
4000	North Durham	Secondary	855	892	37	4,985,000	5,356,000	371,000	7.45%	5,830	6,005	174
4001	Consett	Secondary	1,284	1,350	66	6,509,000	7,132,000	623,000	9.57%	5,070	5,283	214
4006	UTC South Durham	Secondary	275	228	(47)	1,725,000	1,467,000	(258,000)	-14.94%	6,273	6,436	163
4007	Teesdale	Secondary	502	552	50	2,432,000	2,772,000	340,000	13.97%	4,844	5,021	177
4008	Staindrop	Secondary	462	386	(76)	2,502,000	2,168,000	(334,000)	-13.34%	5,415	5,617	202
4009	Whitworth Park	Secondary	798	756	(42)	4,292,000	4,193,000	(99,000)	-2.31%	5,379	5,546	168
4010	The Hermitage	Secondary	1,019	1,004	(15)	5,114,000	5,243,000	129,000	2.51%	5,019	5,222	203
4019	Seaham High	Secondary	1,049	1,111	62	5,671,000	6,226,000	555,000	9.78%	5,406	5,604	198
4047	Park View	Secondary	1,160	1,188	28	5,840,000	6,120,000	280,000	4.79%	5,035	5,152	117
4052	Fyndoune College	Secondary	228	152	(76)	1,397,000	1,010,000	(387,000)	-27.73%	6,127	6,643	515
4099	Tanfield	Secondary	680	711	31	3,720,000	4,042,000	322,000	8.66%	5,470	5,685	214
4128	Parkside	Secondary	826	888	62	4,585,000	5,162,000	577,000	12.59%	5,550	5,813	262
4139	Wolsingham	Secondary	536	609	73	2,732,000	3,203,000	471,000	17.22%	5,098	5,259	162
4150	Ferryhill	Secondary	687	739	52	3,890,000	4,306,000	415,000	10.68%	5,663	5,827	164
4162	Bishop Barrington	Secondary	772	767	(5)	4,293,000	4,386,000	93,000	2.16%	5,561	5,719	157
4175	Woodham	Secondary	732	836	104	3,833,000	4,566,000	732,000	19.11%	5,237	5,462	225
4176	Greenfield	Secondary	935	915	(20)	5,391,000	5,470,000	79,000	1.46%	5,766	5,978	212
4178	King James 1	Secondary	736	777	41	4,281,000	4,632,000	351,000	8.21%	5,816	5,961	145
4185	Belmont	Secondary	756	751	(5)	4,055,000	4,184,000	128,000	3.16%	5,364	5,571	207

**Children and Young People's Overview and Scrutiny Committee, 13 January 2019**  
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<b>Totals</b>			<b>64,359</b>	<b>64,728</b>	<b>369</b>	<b>£299,839,000</b>	<b>£312,772,000</b>	<b>£12,933,000</b>				
4190	Framwellgate	Secondary	1,003	1,117	114	4,904,000	5,723,000	820,000	16.72%	4,889	5,124	235
4192	DCBC	Secondary	316	309	(7)	1,870,000	1,899,000	29,000	1.54%	5,917	6,145	227
4200	Johnston	Secondary	1,295	1,316	21	6,143,000	6,580,000	437,000	7.11%	4,744	5,000	256
4214	Dene	Secondary	624	642	18	3,865,000	4,101,000	236,000	6.11%	6,193	6,388	194
4215	Shotton Hall	Secondary	1,231	1,230	(1)	6,574,000	6,808,000	234,000	3.56%	5,341	5,535	195
4218	Wellfield	Secondary	741	821	80	4,080,000	4,726,000	647,000	15.86%	5,506	5,757	251
4231	Sedgefield	Secondary	988	989	1	4,946,000	5,124,000	178,000	3.60%	5,006	5,181	175
4280	Easington	Secondary	741	749	8	3,988,000	4,153,000	165,000	4.15%	5,382	5,545	163
4681	St John's RC	Secondary	1,163	1,177	14	5,905,000	6,236,000	330,000	5.59%	5,078	5,298	220
4691	St. Leonard's RC	Secondary	1,154	1,157	3	5,481,000	5,785,000	304,000	5.55%	4,750	5,000	250
4693	St. Bede's RC, Peterlee	Secondary	501	558	57	2,791,000	3,182,000	391,000	13.99%	5,572	5,702	131
4694	St Bede's RC, Lanchester	Secondary	1,192	1,207	15	5,856,000	6,164,000	308,000	5.26%	4,913	5,107	194

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## Appendix 5: Equalities Impact Assessment

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### Durham County Council Equality Impact Assessment

**NB:** The Public Sector Equality Duty (Equality Act 2010) requires Durham County Council to have 'due regard' to the need to eliminate unlawful discrimination, harassment and victimisation, advance equality of opportunity and foster good relations between people from different groups. Assessing impact on equality and recording this is one of the key ways in which we can show due regard.

#### Section One: Description and Screening

<b>Service/Team or Section</b>	Financial Services, School Funding Team
<b>Lead Officer</b>	David Shirer
<b>Title</b>	Mainstream primary and secondary formula 2020-21
<b>MTFP Reference (if relevant)</b>	
<b>Cabinet Date (if relevant)</b>	11 December 2019
<b>Start Date</b>	1 April 2020
<b>Review Date</b>	

#### Subject of the Impact Assessment

Please give a brief description of the policy, proposal or practice as appropriate (a copy of the subject can be attached or insert a web-link):

The Council is required to set a local formula to distribute funding to mainstream primary and secondary schools, including academies. Government policy is to replace local formulas with the National Funding Formula (NFF). There is no date for the replacement of local formulas, but it will be no earlier than 2021-22.

Since 2018-19 the local formula in Durham has used a transitional version, which recognises the need to reduce differences between the local formula and the NFF, in order to avoid excessive funding turbulence when the NFF replaces local formulas, whilst also not making commitments so far in advance of confirmation of the date of the replacement of local formulas and the final version of the NFF.

A national EIA for the NFF is available through the gov.uk website:

<https://www.gov.uk/government/publications/national-funding-formula-for-schools-and-high-needs> (Pages 17 to 19)

This is relevant, because the transitional option, is based on the NFF.

The council has also considered options for the level of protection provided through the Minimum Funding Guarantee (MFG), which limits changes in funding per pupil arising from changes to the formula. In the past it has been used to limit reductions in funding from year-to-year. However, for 2020-21, it will be used to guarantee a minimum increase in funding per pupil.

Local authorities will be able to set a minimum increase in a range from 0.5% to 1.84%.

The MFG is funded by capping increases in funding per pupil for other schools, so setting a higher rate for the MFG will benefit some schools, but disadvantage others.

The council is minded to adopt a transitional rate for the MFG for 2020-21, which would be 1.17%, the mid-point between the minimum and maximum of the permitted range.

The effect of the MFG options on funding is limited:

<b><i>MFG funding and cap on increases in funding per pupil</i></b>	<b>MFG = 0.5%</b>	<b>MFG = 1.0%</b>	<b>MFG = 1.17%</b>	<b>MFG = 1.5%</b>	<b>MFG = 1.84%</b>
Funding provided through MFG (£, rounded)	103,000	119,000	125,000	145,000	173,000
Cap on increases in funding per pupil	6.71%	6.51%	6.44%	6.27%	6.06%
Number of schools with MFG funding	10	10	11	13	15
Number of schools that have funding capped	6	11	11	16	19

Because of the limited impact this is not considered further in this impact assessment.

Who are the main stakeholders? (e.g. general public, staff, members, specific clients/service users):

Pupils, their families and school-based staff. Also affected are the Council, which is responsible for maintaining schools, academy trusts and Roman Catholic and Church of England diocese, in respect of voluntary controlled and voluntary aided schools.

## Screening

Is there any actual or potential negative or positive impact on the following protected characteristics?

Protected Characteristic	Negative Impact Indicate: Y = Yes, N = No, ? = unsure	Positive Impact Indicate: Y = Yes, N = No, ? = unsure
Age	N	N
Disability	N	Y
Marriage and civil partnership (workplace only)	N	N
Pregnancy and maternity	N	N
Race (ethnicity)	N	N
Religion or Belief	N	N
Sex (gender)	N	N
Sexual orientation	N	N
Transgender	N	N

Please provide **brief** details of any potential to cause adverse impact. Record full details and analysis in the following section of this assessment.

--

How will this policy/proposal/practice promote our commitment to our legal responsibilities under the public sector equality duty to:

- eliminate discrimination, harassment and victimisation,
- advance equality of opportunity, and
- foster good relations between people from different groups?

The formula includes factors which act as proxy measures for pupils who are likely to need additional support to achieve the expected level of attainment, which will contribute to increasing equality of opportunity.

The formula does not differentiate between pupils from different groups and allocates funding on the basis of factors that are likely to be relevant to their educational needs.

## Evidence

What evidence do you have to support your findings?

Please **outline** your data sets and/or proposed evidence sources, highlight any gaps and say whether or not you propose to carry out consultation. Record greater detail and analysis in the following section of this assessment.

NFF EIA (see link above)

Analysis in respect of faith schools (attached)

## Screening Summary

On the basis of this screening is there:	Confirm which refers (Y/N)
Evidence of actual or potential impact on some/all of the protected characteristics which will proceed to full assessment?	Y
No evidence of actual or potential impact on some/all of the protected characteristics?	N

## Sign Off

Lead officer sign off: David Shirer	Date: 18 November 2019
Service equality representative sign off: Mary Gallagher	Date: 19 November 2019

If carrying out a full assessment please proceed to section two.

## Section Two: Data analysis and assessment of impact

Please provide details on impacts for people with different protected characteristics relevant to your screening findings. You need to decide if there is or likely to be a differential impact for some. Highlight the positives e.g. benefits for certain groups, advancing equality, as well as the negatives e.g. barriers for and/or exclusion of particular groups. Record the evidence you have used to support or explain your conclusions. Devise and record mitigating actions where necessary.

Protected Characteristic: <b>Age</b>															
What is the actual or potential impact on stakeholders?	Record of evidence to support or explain your conclusions on impact.		What further action or mitigation is required?												
No adverse impact	<p>Basic funding per pupil increases from primary (reception to Year 6) to KS3 (Years 7 to 9) to KS4 (Years 10 to 11). This is in line with normal practice in most authorities and the NFF and recognises the increasing cost per pupil as they get older: <i>As pupils progress through key stages, the breadth and complexity of the curriculum increases, requiring more subject experts, specialist teaching facilities and examination fees expenditure. (NFF EIA, paragraph 19, DfE).</i></p>		None												
<table border="1"> <thead> <tr> <th><b>Basic funding per pupil in 2020-21 formula options (£ / pupil)</b></th> <th><b>Primary</b></th> <th><b>KS3</b></th> <th><b>KS4</b></th> </tr> </thead> <tbody> <tr> <td>Non-faith schools</td> <td>2,904.05</td> <td>4,017.43</td> <td>4,759.79</td> </tr> <tr> <td>Faith schools</td> <td>2,904.05</td> <td>4,017.43</td> <td>4,759.79</td> </tr> </tbody> </table>				<b>Basic funding per pupil in 2020-21 formula options (£ / pupil)</b>	<b>Primary</b>	<b>KS3</b>	<b>KS4</b>	Non-faith schools	2,904.05	4,017.43	4,759.79	Faith schools	2,904.05	4,017.43	4,759.79
<b>Basic funding per pupil in 2020-21 formula options (£ / pupil)</b>	<b>Primary</b>	<b>KS3</b>	<b>KS4</b>												
Non-faith schools	2,904.05	4,017.43	4,759.79												
Faith schools	2,904.05	4,017.43	4,759.79												

Protected Characteristic: <b>Disability</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
<p>Limited positive impact</p> <p>The transitional formula will increase the proportion of funding allocated to Low Prior Attainment (LPA), which is one of the DfE's proxy indicators for Special Educational Needs (SEN).</p>	<p>Most funding to meet the needs of children with disabilities is provided separately to this formula.</p> <p>The proportion of LPA allocated funding will increase from 4.8% in the 2019-20 formula to 6.1% in the transitional formula.</p>	None

Protected Characteristic: <b>Marriage and civil partnership (workplace only)</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
N/A		

Protected Characteristic: <b>Pregnancy and maternity</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
None	This is not relevant to school funding	None

Protected Characteristic: <b>Race (ethnicity)</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
<p>Limited positive impact</p> <p>The transitional formula will include a factor in respect of pupils with English as an Additional Language providing slightly more resources to schools for such pupils.</p> <p>The transitional formula will include a mobility factor, which is potentially relevant to Gypsy/Roma pupils and pupils of Irish traveller heritage.</p>	<p>Support is provided centrally for schools in respect of these pupils, but this change will mean that the formula will allocate relatively more resources to schools with relatively more pupils recorded as having had English as an Additional Language in the past three years.</p> <p>This factor was not used in the formula in previous years, because the funding allocated to Durham for the formula did not include any allocation for mobility. The funding for 2020-21 will include funding for mobility and this will be included as part of the transitional formula.</p> <p>Support for Gypsy/Roma pupils and pupils of Irish traveller heritage is available through centrally funded service provided by the Council, which responds to specific needs, as opposed to a formula allocation based on lagged data.</p>	<p>None</p>

Protected Characteristic: <b>Religion or belief</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
<p>The formula is applied to Roman Catholic primary and secondary schools and Church of England primary schools (there are no Church of England secondary schools). The formula does not differentiate between schools according to whether they are faith schools or not.</p> <p>Funding per pupil for faith schools is less than for other schools, but this is a result of applying the formula, which takes account of additional needs (deprivation, English as an Additional Language, mobility and Low Prior Attainment), where faith schools tend to have fewer eligible pupils.</p>	<p>The proportion of pupils who are eligible for funding through additional needs factors is higher for non-faith schools in most categories which is predominately why faith schools will see a smaller increase in funding per pupil.</p> <p>See 'Annex A' accompanying this EIA</p>	<p>None</p>

Protected Characteristic: <b>Sex (gender)</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
The formula does not differentiate between pupils on this basis and there are no single-sex schools affected by the formula		None

Protected Characteristic: <b>Sexual orientation</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
None	The formula does not differentiate between pupils on this basis	None

Protected Characteristic: <b>Transgender</b>		
What is the actual or potential impact on stakeholders?	Explain your conclusion considering relevant evidence and consultation	What further action or mitigation is required?
None	The formula does not differentiate between pupils on this basis	None

## Section Three: Conclusion and Review

### Summary

Please provide a brief summary of your findings stating the main impacts, both positive and negative, across the protected characteristics.

With the exception of age, the formula does not differentiate according to protected characteristics. The differentiation in respect of age is in accordance with common practice and recognises differences in the provision required by pupils of different ages. There is a small positive impact in relation to disability as the transitional formula will increase the proportion of funding allocated to Low Prior

Attainment (LPA), which is one of the DfE's proxy indicators for Special Educational Needs (SEN).

Faith schools generally receive less funding than non-faith schools. The formula does not differentiate between schools but does take account of additional needs and school size in calculating allocations. A comparison of faith and non-faith schools supports a view that differences between these types of school is a result of differences in the proportion of pupils who are eligible for additional needs funding in pupil characteristics and school size.

Will this promote positive relationships between different communities? If so how?

No impact expected

### Action Plan

Action	Responsibility	Timescales for implementation	In which plan will the action appear?
None required	Not Applicable	Not Applicable	Not Applicable

### Review

Are there any additional assessments that need to be undertaken? (Y/N)	Analysis of gender declared on school censuses
When will this assessment be reviewed? Please also insert this date at the front of the template	November 2020 – In line with the setting of the schools formula for 2021-22

### Sign Off

Lead officer sign off: David Shirer	Date: 19 November 2019
Service equality representative sign off: Mary Gallagher	Date: 20 November 2019

## Annex A:

### Protected Characteristic: Religion or belief

1. The formula is applied to Roman Catholic primary and secondary schools and Church of England primary schools (there are no Church of England secondary schools). The formula does not differentiate between schools according to whether they are faith schools or not. At present formulas are set locally, but the National Funding Formula (NFF) will replace local formulas sometime after 2020-21.
2. Since 2018-19 the local formula in Durham has used a transitional version, which recognises the need to reduce differences between the local formula and the NFF, in order to avoid excessive funding turbulence when the NFF replaces local formulas, whilst also not making commitments so far in advance of confirmation of the date of the replacement of local formulas and the final version of the NFF.
3. Table 1 shows average funding per pupil, broken down between faith and non-faith schools and primary and secondary. Funding per pupil is more for non-faith schools for both primary and secondary:

<b><i>Average funding per pupil (£, rounded)</i></b>	<b>Faith schools</b>	<b>Non-faith schools</b>
Primary	4,600	5,100
Secondary	5,300	5,700

4. This pattern is repeated for average pupil-led funding. Pupil-led funding includes the basic amount per pupil plus funding for additional pupil needs (deprivation, low prior attainment, English as an Additional Language and mobility):

<b><i>Average pupil-led funding per pupil (£, rounded)</i></b>	<b>Faith schools</b>	<b>Non-faith schools</b>
Primary	3,600	3,800
Secondary	5,100	5,400

5. Basic funding per pupil is the same for all schools, whether faith or non-faith. The rates of funding per pupil for additional pupil needs are the same for all schools but the proportion of pupils who are eligible for additional needs funding varies between schools and for most needs the proportion is greater for non-faith schools, which is why the pupil-led funding per pupil is greater for non-faith schools. A breakdown by formula factor is shown in Appendix B.
6. Funding is also provided for school-led factors, principally an amount per school, (lump sum), plus amounts for schools in sparsely populated areas, schools with split-sites and a school that shares facilities with a leisure centre. These factors are allocated on the same basis across all primary and all secondary schools, regardless of whether they are faith schools or not, according to whether they meet the criteria for eligibility. The only differences are in the lump sums per school between primary and secondary schools.
7. The school-led funding per pupil for faith and non-faith schools is shown below, along with the numbers of pupils on roll recorded for the purposes of determining formula funding:

<b>Table 3</b>				
	<b>Average school-led funding per pupil (£)</b>		<b>Average number on Roll</b>	
	<b>Faith schools</b>	<b>Non-faith schools</b>	<b>Faith schools</b>	<b>Non-faith schools</b>
Primary	983	1,209	162	194
Secondary	144	208	1,003	805

8. It might be expected that school-led funding per pupil would be greater for the category with fewer pupils, because school-led funding is spread over fewer pupils than in larger schools. Table 3 shows that this is the case for secondary schools, but not primary schools, for which, despite the average number of pupils being smaller in faith schools, the average funding per pupil is less than for non-faith schools.
9. The figures for non-faith schools are distorted by four schools with pupil-led funding of more than £5,000 per pupil. This is partly because they are very small, with numbers on roll of six, eight, thirteen and

twenty-three pupils, and partly because these schools all qualify for sparsity funding. If these schools are excluded, the funding per pupil for non-faith schools is £838 for primary schools, which is less than the funding per pupil for faith primary schools.

10. Schools are also affected by a requirement to provide funding at a Minimum Per Pupil Funding level and the Minimum Funding Guarantee (MFG). These apply equally to faith and non-faith schools. The MPPF is part of the NFF and is mandatory for local formulas. This is assessed as part of the EIA for the NFF, which can be accessed through:

<https://www.gov.uk/government/publications/national-funding-formula-for-schools-and-high-needs> (Pages 17 to 19)

11. The impact of MFG funding has not been assessed, because of its limited impact. A summary of the impact is shown below:

<b>Table 4</b>				
	<b>Average school-led funding per pupil (£)</b>		<b>Average number on Roll</b>	
	<b>Faith schools</b>	<b>Non-faith schools</b>	<b>Faith schools</b>	<b>Non-faith schools</b>
Primary	7,600	(3,300)	5	16
Secondary	-	15,200	-	1

12. The average for non-faith primary schools is a negative number, because MFG adjustments include the impact of capping increases in funding per pupil. None of the faith schools had a negative MFG adjustment.

Annex B:

<b>Pupils entitled to additional pupil-led funding</b>		<b>Faith schools</b>	<b>Non-faith schools</b>	<b>Difference</b>	
Free School Meals	Prim	15.36%	26.89%	-11.53%	Pupils who were recorded as eligible for FSM on the preceding October's School Census
	Sec	12.38%	21.19%	-8.82%	
FSM Ever6	Prim	20.93%	34.91%	-13.98%	Pupils who have been recorded as eligible for FSM on any School Census in the past six years
	Sec	22.09%	36.22%	-14.13%	
IDACI Band G	Prim	51.67%	38.04%	13.63%	The pupils least likely to suffer deprivation on the basis of the Income Deprivation Affecting Children Index – these pupils are not eligible for deprivation funding through this factor
	Sec	45.52%	39.70%	5.82%	
IDACI Band F	Prim	15.24%	15.53%	-0.29%	Pupils eligible for IDACI funding. Those in band F are the least likely to suffer deprivation
IDACI Band E		10.42%	17.73%	-7.31%	
IDACI Band D		10.53%	14.09%	-3.57%	
IDACI Band C		8.08%	12.21%	-4.13%	
IDACI Band B		12.43%	11.89%	0.54%	
IDACI Band A		9.32%	12.67%	-3.34%	
IDACI Band F	Sec	14.96%	12.92%	2.03%	
IDACI Band E		12.87%	15.07%	-2.19%	
IDACI Band D		10.44%	11.77%	-1.33%	
IDACI Band C		6.70%	8.06%	-1.36%	
IDACI Band B		6.27%	8.12%	-1.85%	
IDACI Band A		4.32%	7.15%	-2.82%	
English as an Additional Language	Prim	3.36%	2.30%	1.06%	Pupils recorded as not having English as a first language in the last three years
	Sec	0.20%	0.58%	-0.38%	

<b>Pupils entitled to additional pupil-led funding</b>		<b>Faith schools</b>	<b>Non-faith schools</b>	<b>Diff-erence</b>	
Mobility	Prim	4.46%	5.87%	-1.41%	Pupils who have moved during the academic year
	Sec	1.90%	3.57%	-1.67%	
Low Prior Attainment	Prim	33.20%	37.97%	-4.77%	Pupils who have not reached the expected standard in their previous phase of education
	Sec	16.44%	20.14%	-3.70%	

13. Note that the proportions of pupils who are eligible for funding through these factors is higher for non-faith schools in most categories. Note also that the proportion of pupils in IDACI Band G, who are not eligible for funding, because they have the lowest probability of suffering deprivation, is higher for faith schools, particularly primary schools.