

To all members of the Sunderland Schools Forum

Together for Children
Sunderland
City Hall – Level 2
Plater Way
Sunderland
SR1 3AA

Date: xxx
Our TFC-SF/ZW

Dear Colleague

SUNDERLAND SCHOOLS FORUM

You are invited to attend a meeting of the Schools Forum, scheduled for Thursday 15th January 2026 – **kindly note SSF members can arrange for a proxy to attend in their absence.**

The meeting will be held virtually, and a Teams appointment has been circulated.

AGENDA

25/57	<p>Welcome, Introductions and Apologies</p> <p>SSF Vacancies/Appointment Proposals</p> <ul style="list-style-type: none"> - 2 x Academies Primary Nomination: Mrs Sarah Chapman, Finance Manager at Aim High Academy Trust - 2 x Academy Secondary and All Through Mrs K Dunn and Ms J Dodd - 1 x Roman Catholic Diocese - 1 x Maintained Faith School Headteacher/Representative <p><i>Lindsay Robertson will attend to represent North Primary Headteachers as a replacement for Mrs Lisa Wood</i></p> <p>Apologies for absence submitted by Mr D Amos, Mr J Lines, Mrs J Maw and Mrs K Richardson.</p>	
25/58	<p>Declarations of Interest</p>	
25/59	<p>Minutes of Previous Meeting</p> <p>School Forum meeting, held on 20th November 2025 (attached) (appendix 3)</p>	
25/60	<p>Matters Arising from the Minutes/Agreed Actions</p> <p>Action Log, from 20th November 2025 (appendix 4)</p>	
25/61	<p>Feedback from Short Life Working Groups/Sub Groups</p> <ul style="list-style-type: none"> • Audit and Assurance Sub-Group • Quality Assurance Processes for Service Providers • DBV Funding: High Needs Block Business Plan 	

25/62	Presentations: <ul style="list-style-type: none"> • MTFP Presentation (to be confirmed) 	Claire Emmerson
25/63	Reports for Discussion and Decision <ul style="list-style-type: none"> • Dedicated Schools Grant Projected Outturn 2025/26 Voting: N / A • Budget Planning Framework 2026/27 Voting: 2 – Schools Block Funding Formula Voting: 4 – Early Years Funding Formula • Growth and Falling Rolls Funding Report 	DD / DO JH / DO AR
25/64	Any Other Business	
25/65	Date and Time of Next Meeting 19 th February 2026 - Can Members please confirm if this date is acceptable in terms of the Spring Half Term holidays.	

Please do not hesitate to contact me if you have any queries.

Yours faithfully



Zena Wilkinson
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Governor Support Team
Together for Children
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SCHOOLS FORUMS MEMBERSHIP – JULY 2025

				<u>VOTING RIGHTS</u>				
SCHOOL MEMBERS				1	2	3	4	5
1.	Maintained Primary School Headteacher (Mandatory)			Y	Y	Y	Y	Y
	Maintained Primary Schools South Headteacher	Catherine Jones – Headteacher	Thorney Close Primary School	<p>No voting rights: the views of the individual Primary Headteacher Clusters Groups will be put forward by the Maintained Primary Schools representative.</p> <p>In the event of the Maintained Primary School Teacher absence a Deputy will be appointed to share the views of the individual Primary Headteacher Cluster Groups.</p>				
	Maintained Primary Schools North Headteacher	Lindsay Robertson - Headteacher	Willow Wood Primary School					
	Maintained Primary Schools Washington Headteacher	Sara Bainbridge - Headteacher	Barmston Village Primary School					
	Maintained Primary Schools Hetton/Houghton Headteacher	Nicola Hill - Headteacher	Hetton Primary					
2.	Maintained Special School Teacher (Mandatory)	James Waller – Headteacher: CHAIR	Sunningdale School					
3.	Maintained Nursery Headteacher (Mandatory)	Ailsa Higgins - Headteacher	Hetton Lyons/ Usworth	Y	Y		Y	Y
4.	Maintained Pupil Referral Service Headteacher (Mandatory)	Donna Walker - Headteacher	Link School	Y	Y		Y	Y
5.	Maintained Faith School Headteacher/Representative	Vacancy		Y	Y	Y	Y	Y
6.	Maintained Sector School Governor	Michael Hartnack - Governor	Grange Park Primary School	Y	Y	Y	Y	Y
7.	Academy Primary, Infants and Junior	Emma Jarvis – Headteacher (Hetton/Houghton)	Dubmire Primary		Y		Y	Y

SCHOOLS FORUMS MEMBERSHIP – JULY 2025

8	Academy Primary, Infants and Junior	Audrey Bolam – Headteacher (Washington)	Oxclos e Primary		Y		Y	Y
9.	Academy Primary, Infants and Junior	John Lines – Headteacher (Washington)	Columbia Academy		Y		Y	Y
10.	Academy Primary, Infants and Junior	Lauren Reeves – COO (South)	Vision Learning Trust (Hillview		Y		Y	Y
11.	Academy Primary, Infants and Junior	Courtney Snowball – Business Manager	Diamond Hall Infant School		Y		Y	Y
12.	Academy Primary, Infants and Junior	Mandy Henderson - SBM	Ryhope Infant Academy		Y		Y	Y
13.	Academy Primary, Infants and Junior	Vacant			Y		Y	Y
14.	Academy Primary, Infants and Junior	Vacant			Y		Y	Y
15.	Academy Secondary and All Through	David Amos	Academy 360		Y			Y
16.	Academy Secondary and All Through	Madeline Hope – Director of Finance	Bishop Chadwick Education Trust		Y			Y
17.	Academy Secondary and All Through	Vacant			Y			Y
18.	Academy Secondary and All Through	Vacant			Y			Y
19.	Academy Secondary and All Through	Joanne Maw – Chief Executive officer	Aspire Learning Trust		Y			Y
20.	Academy Secondary and All Through	Phil Smith – Chief Finance Officer	Castleview Academy		Y			Y
21.	Academy Secondary and All Through	Vicki Pinkney - Headteacher	Hetton Academ y		Y			Y

SCHOOLS FORUMS MEMBERSHIP – JULY 2025

22.	Academy Secondary and All Through	Colin Devlin – VICE CHAIR	Kepier Academy		Y			Y
23.	Academy Special (Mandatory)	Mick Little – Chief Operations Manager	Ascent		Y			Y

SCHOOLS FORUMS MEMBERSHIP – JULY 2025

				<u>VOTING RIGHTS</u>				
SCHOOL MEMBERS				1	2	3	4	5
1.	Maintained Primary School Headteacher (Mandatory)			Y	Y	Y	Y	Y
	Maintained Primary Schools South Headteacher	Catherine Jones – Headteacher	Thorney Close Primary School	<p>No voting rights: the views of the individual Primary Headteacher Clusters Groups will be put forward by the Maintained Primary Schools representative.</p> <p>In the event of the Maintained Primary School Teacher absence a Deputy will be appointed to share the views of the individual Primary Headteacher Cluster Groups.</p>				
	Maintained Primary Schools North Headteacher	Lindsay Robertson - Headteacher	Willow Wood Primary School					
	Maintained Primary Schools Washington Headteacher	Sara Bainbridge - Headteacher	Barmston Village Primary School					
	Maintained Primary Schools Hetton/Houghton Headteacher	Nicola Hill - Headteacher	Hetton Primary					
2.	Maintained Special School Teacher (Mandatory)	James Waller – Headteacher: CHAIR	Sunningdale School					
3.	Maintained Nursery Headteacher (Mandatory)	Ailsa Higgins - Headteacher	Hetton Lyons/ Usworth	Y	Y		Y	Y
4.	Maintained Pupil Referral Service Headteacher (Mandatory)	Donna Walker - Headteacher	Link School	Y	Y		Y	Y
5.	Maintained Faith School Headteacher/Representative	Vacancy		Y	Y	Y	Y	Y
6.	Maintained Sector School Governor	Michael Hartnack - Governor	Grange Park Primary School	Y	Y	Y	Y	Y
7.	Academy Primary, Infants and Junior	Emma Jarvis – Headteacher (Hetton/Houghton)	Dubmire Primary		Y		Y	Y
8	Academy Primary, Infants and Junior	Audrey Bolam – Headteacher (Washington)	Oxclose Primary		Y		Y	Y

SCHOOLS FORUMS MEMBERSHIP – JULY 2025

9.	Academy Primary, Infants and Junior	John Lines – Headteacher (Washington)	Columbia Academy		Y		Y	Y
10.	Academy Primary, Infants and Junior	Lauren Reeves – COO (South)	Vision Learning Trust (Hillview)		Y		Y	Y
11.	Academy Primary, Infants and Junior	Courtney Snowball – Business Manager	Diamond Hall Infant School		Y		Y	Y
12.	Academy Primary, Infants and Junior	Mandy Henderson - SBM	Ryhope Infant Academy		Y		Y	Y
13.	Academy Primary, Infants and Junior	Vacant			Y		Y	Y
14.	Academy Primary, Infants and Junior	Vacant			Y		Y	Y
15.	Academy Secondary and All Through	David Amos	Academy 360		Y			Y
16.	Academy Secondary and All Through	Madeline Hope – Director of Finance	Bishop Chadwick Education Trust		Y			Y
17.	Academy Secondary and All Through	Vacant			Y			Y
18.	Academy Secondary and All Through	Vacant			Y			Y
19.	Academy Secondary and All Through	Joanne Maw – Chief Executive officer	Aspire Learning Trust		Y			Y
20.	Academy Secondary and All Through	Phil Smith – Chief Finance Officer	Castleview Academy		Y			Y
21.	Academy Secondary and All Through	Vicki Pinkney - Headteacher	Hetton Academy		Y			Y
22.	Academy Secondary and All Through	Colin Devlin – VICE CHAIR	Kepier Academy		Y			Y
23.	Academy Special (Mandatory)	Mick Little – Chief Operations Manager	Ascent		Y			Y

NON SCHOOL MEMBERS								
24.	Private, Voluntary & Independent Nurseries	David Martin	Chilton Moor Nursery		**		Y	Y
25.	Private, Voluntary & Independent Nurseries	Michelle Barr, Nursery owner and Manger	Buttons Nursery Washington		**		Y	y
26.	Post 16 Provision	Vikki Morton	Sunderland College					Y
27.	Teacher Associations	Andy Lewis						Y
28.	Roman Catholic Diocese	Vacant						Y
29.	Church of England Diocese	Sarah Armstrong	Benedict Biscop					Y
TOGETHER FOR CHILDREN OFFICERS & COUNCILLORS								
	Head of Accounting & Finance	Deborah Orr						
	Director of Education	Kim Richardson						
	Strategic Service Lead – Education							
	Lead Member Children’s Services	Cllr M Butler						
	Lead Member Children’s Services Deputy – No longer applicable							
	Deputy s.151 Officer	Claire Emmerson						
MEMBERSHIP VOTING RIGHTS								
1	Scheme for Financing Schools (Maintained)							
2	Schools Block Funding Formula							
3.	De-delegation maintained schools							
4.	Early Years Single Funding Formula							
5.	All other School Forum Decisions	a. Central expenditure relating to school’s block b. Deficits on central expenditure to be funded from following year’s DSG. c. Voting procedures						

SUNDERLAND SCHOOLS FORUM

Minutes of the Meeting Held on Thursday 20th November 2025 at 8.30 am

School Forum Member Attendance

Voting

James Waller (JW) (Chair)	Maintained Special School Teacher
David Amos (DA)	Academy Secondary and All Through
Sarah Armstrong (SA)	Church of England Diocese
Michelle Barr (MB)	Private, Voluntary & Independent Nurseries
Audrey Bolam (AB)	Academy Primary, Infant and Junior
Colin Devlin (CD)	Academy Secondary and All Through
Michael Hartnack (MH)	Maintained Primary – Governor
Mandy Henderson (MHe)	Academy Primary, Infants and Junior
Ailsa Higgins (AH)	Maintained Nursery
Madeline Hope (MHo)	Academy Secondary and All Through
Emma Jarvis (EJ)	Academy Primary, Infant and Junior
Catherine Jones (CJ)	Maintained Primary School
Andy Lewis (AL)	Teacher Association
John Lines (JL)	Academy Primary, Infants and Junior
Michael Little (ML)	Academy Special
David Martyn (DM)	Private, Voluntary & Independent Nurseries
Vicky Pinkney (VP)	Academy Secondary and All Through
Joanne Maw (JM)	Academy Secondary and All Through
Lauren Reeves (LR)	Academy Primary, Infant and Junior
Courtney Snowball (CS)	Academy Primary, Infant and Junior
Donna Walker (DW)	Maintained Pupil Referral Services
Lindsay Robertson (LR)	Maintained Primary School

Together for Children Officers and Councillors

Cllr J Butler (JB)	Lead Member, Children's Services
Kevin Brown	Director of Transformation, Innovation and Strategy
Richard Cullen (RC)	TfC Strategic, School Improvement
Debra Dixon (DD)	TfC Team Manager, Management Accounting Team
John Hope (JH)	TfC Technical Accountant Education Funding
Emma Leech (EL)	TfC Finance Business Partner
Ronnie Lynn (RL)	TfC Internal Strategic Lead, Education
Leigh Morris (LM)	TfC Team Manager, School Finance
Emma Nolan	TfC Finance Business Partner
Deborah Orr (DO)	TfC Head of Accounting and Finance
Kim Richardson (KR)	TfC Director of Education
Gemma Slater (GS)	TfC Trainee Accounting Technician
Zena Wilkinson	Schools Forum Clerk

In Attendance

Sarah Chapman	Observer
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		Agreed Action
25/47	<p><u>Review of Effectiveness of the Sunderland Schools Forum (SSF)</u></p> <p><u>Terms of Reference/Membership</u></p> <p>JW raised a query in relation to the Maintained Special School Teacher position on the SSF, as in 2026 there was not expected to be any maintained special schools within Sunderland. Members agreed to review the Terms of Reference and Membership structures in 2026.</p> <p>Members agreed there were no changes required, at this time, to the Membership/Terms of Reference but it was noted these should be reviewed in 2026, in line with no longer having a maintained special school.</p> <p>The Clerk invited comments in relation to the current arrangements implemented when a meeting was convened. Following discussion the following issues were raised:</p> <ol style="list-style-type: none"> 1. Concerns raised in relation to the receipt of reports by individual forums as it was felt insufficient time was being provided to consider proposals. 2. Concerns raised in relation to consultation processes being implemented outside of the forum and the potential for the outcome to negate the need for proposals to be formally considered within the SSF and voted on by SSF representatives on behalf of their representative groups. 3. Concerns in relation to the content of reports, in terms of the lack of depth of information. <p>The Clerk confirmed this information would be relayed to the respective professionals.</p>	<p>Proposal to change the membership structure to be put forward when Sunningdale School converts to an academy</p>
25/48	<p><u>Welcome, Introductions and Apologies</u></p> <p>JW welcomed everyone to the meeting.</p> <p>The Clerk advised that Lindsay Robertson would be attending future meetings, to represent North Primary Headteachers, replacing Lisa Wood.</p> <p>The Clerk confirmed the current vacancies on the SSF.</p> <p>The Clerk advised that apologies for absence had been submitted by Mrs P NRobertson and Mr Smith.</p> <p>The Clerk confirmed a quorum was present and the meeting could proceed to business.</p>	
25/49	<p><u>Declarations of Interest</u></p> <p>MH advised that as an elected Councillor he would raise declarations throughout the meeting, if appropriate.</p>	

	<p>MB declared an interest as her school was detailed within one of the reports to be considered.</p> <p>SSF members NOTED:</p> <ul style="list-style-type: none"> - The declarations of interest in relation to the business to be considered. - Declarations could be made throughout the meeting, if appropriate. 	
25/50	<p><u>Minutes of Previous Meeting</u></p> <p>SSF members RESOLVED:</p> <ul style="list-style-type: none"> - To accept the minutes of the Sunderland Schools Forum (SSF) held on 18th October 2025 as a true record. 	
25/51	<p><u>Matters Arising from the Minutes/Agreed Actions</u></p> <p>Members confirmed they had received a copy of the Action Log prior to the meeting for consideration.</p> <p>25/36 Welcome and Introductions Ongoing - DW confirmed she had extended an invitation for Secondary Headteachers to become SSF members at the Secondary Headteacher forum. Members were advised that no nominations were put forward.</p> <p>25/38 Review of Effectiveness of the SSF Completed - A Review of the Effectiveness of the SSF had been undertaken at today's meeting.</p> <p>25/42 Feedback from Short Life Working Groups Outstanding – DBV funding: PR to share copies of the deficit plan when completed, to members of the Audit and Assurance Sub Group.</p> <p>25/44 Reports for Discussion and Decision (Budget Planning Framework) Completed – AL confirmed his offer to attend Primary Headteacher Cluster groups had been extended.</p> <p>25/46 Any Other Business Outstanding – AR to re-circulate the proposals to change the Admissions Co-Ordinator Scheme.</p>	<p>PR</p> <p>AR</p>
25/52	<p><u>Feedback from Short Life Working Groups</u></p> <ul style="list-style-type: none"> • Audit and Assurance <p>SSF Members were advised that CD had been appointed as Chair for the Working Group.</p> <p>CD shared that the Working Group had only met on two occasions, sharing that difficulties had been encountered in relation to identifying areas for focus. CD shared that the focus had now been agreed as “to review expenditure processes”.</p> <p>CD informed Members that DO and DD had tried to provide as much information as requested within follow up actions.</p>	

CD explained that the core focus identified was to understand expenditure and to understand the strategic direction of the LA in terms of the deficit, acknowledging that some of the expenditure identified was to support young adults.

CD noted that a strategic plan had been released for the SEND Inspection, and the Working Group had requested a copy of the strategic plan for 2024/25, as it was felt this would provide an understanding of how future expenditure may grow and how it may be pared back.

CD noted that KR may attend future meetings of the Working Group to provide information but stated that the Working Group would find it beneficial to receive information on Central Team funding use and staffing costs and a breakdown in relation to funding allocated to individual teams, exemplifying the funding allocated to the Attendance Team. CD explained that having a real breakdown of how expenditure was allocated would provide an understanding of areas of growth and whether the current arrangements were appropriate.

CD informed Members that the Working Group were looking for information on quality assurance and steps to try to stop other LA's utilising placements within Sunderland. CD acknowledged PR was "fighting the good fight" to reduce expenditure but stated the Working Group felt it would be beneficial to have a detailed report presented at SSF. CD acknowledged that within some cases places were in line with parental choice and therefore difficult to challenge.

CD stated that the Working Group felt having the information requested would provide a rationale for the expenditure.

CD explained that the Working Group had discussed the identification of where needs sat and data had been requested on this in terms of pupil year groups. CD advised that it was felt if there was the potential to expand support below Early Years, Primary and Secondary ranges this could potentially impact HNB.

CD acknowledged that there had been questions on what was building the deficit position, whilst it was recognised that overall expenditure had increased across all areas and the need to ensure young people were not negatively impacted.

CD advised that it had been identified that some of the Working Group members were members of similar groups within other LA's and there was evidence that all were trying to be frugal and there was a need to realise that this may not be possible, but he felt this Working Group would provide understanding on how the deficit may grow and detail expenditure arrangements.

JW stated that he believed CD had provided a detailed overview and confirmed this was linked to discussions held at the beginning of the meeting when reviewing the effectiveness of the SSF. JW stated that there was a need to understand funding arrangements and the fact funding was not just to cover pupil placements.

<p>KR provided assurance that she did not disagree with the comments made and confirmed officers within TfC wanted to see this level of scrutiny and due diligence. KR stated that she believed the information requested by the Working Group would be provided, explaining this detail was held within financial records and needed to be collated. KR assured SSF members that there was diligence in relation to funding and once the information was collated there may be an opportunity to present this within this forum. KR explained that she believed what was helpful was the fact SSF members were being diligent.</p> <p>KR noted that in terms of the deficit Mrs Emmerson was to attend to present information and detail the impact of the wider Council spending and risks.</p> <p>KR provided assurance that the Council and TfC were diligent in relation to expenditure and agreed there was a need for scrutiny in relation to expenditure, whilst acknowledging that there would be growth areas.</p> <p>KR highlighted that TfC was answerable to the Section 151 Officer, and they needed to evidence they were being diligent.</p> <p>KR confirmed that Sunderland City Council/TfC were in a fortunate position when compared to other LA's.</p> <p>CJ shared that within the South Primary Headteacher meeting, questions had been raised in relation to the actual usage of the HNB funding.</p> <p>CJ stated that she had been an SSF member for a number of years and had not understood that once some of the Teams were implemented/appointments made, funded via HNB, these continued and the SSF was not presented with any detail in relation to what the actual HNB funding was spent on. KR advised that she did not have the specific detail on expenditure but confirmed that it was utilised to support the running of the whole SEND system and deliver statutory services and explained that this was not just binary in terms of meeting costs.</p> <p>DD agreed to share the DfE High Needs Funding guidance.</p> <p>ML acknowledged that the "devil was in the detail" and the discussions so far had brought forward further questions, stating that he believed there was a need for a clear, direct and long term SEND plan. ML shared that he believed there were some key points identified in relation to key offers and how organisations could work more collaboratively to retain services needed within local provisions and not through private providers.</p> <ul style="list-style-type: none"> • Quality Assurance Process for Service Providers • DBS Funding: HNB Business Plan <p>KR advised Members that there were no specific updates in relation to these items of business.</p>	<p>DD</p>
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25/53	<p><u>Presentations</u></p> <ul style="list-style-type: none"> • Medium Term Financial Plan Presentation <p>The Clerk confirmed she had e-mailed the presentation proposal to CE but had not received a response.</p> <p>ML noted that the Section 151 Officer, or their representative, had been invited to attend the SSF on a number of occasions. ML highlighted the importance of the HNB funding and stated he would query why no-one had attended as the SSF were talking about a significant level of funding. ML stated that he made an effort to attend these forums, therefore would question why others would not. JW agreed with these statements. Following discussions JW agreed to write to PW and CE regarding future assurances for attendance at the SSF.</p> <p>SSF Members NOTED:</p> <ul style="list-style-type: none"> - There were no presentations to be presented within the meeting. 	JW
25/54	<p><u>Reports for Discussion and Decision</u></p> <ul style="list-style-type: none"> • HNB Block Commissioned Places <p>SSF members confirmed they had received a copy of the following report prior to the meeting for consideration:</p> <ul style="list-style-type: none"> ➤ Commissioning of High Needs Places for 2026/27 in Special Schools, Additional Resource Provisions (ARPs) and Alternative Provisions (AP) (v2) <p>RL explained that the report detailed the placement proposals for 2026/27, explaining that the report had been slightly amended in terms of the placement numbers.</p> <p>RL advised that there was proposed growth in some areas, exemplifying the Link School.</p> <p>RL invited questions or comments on the report circulated.</p> <p>JW acknowledged that a dynamic report had been presented, and any changes would be presented to the SSF as needed. RL confirmed this statement, sharing that TfC would also spot purchase some provisions and explained that the report detailed the commissioned placement proposals.</p> <p>Following a vote process SSF Members RESOLVED:</p> <ul style="list-style-type: none"> - To agree the proposed commissioned places for 2026/27, as presented, in order for a submission to be made to the Education and Skills Funding Agency (ESFA). - To receive updated reports in January 2026, should any changes be made. <ul style="list-style-type: none"> • Budget Planning Framework 2026/27 	

SSF Members confirmed they had received a copy of the following report prior to the meeting for consideration:

➤ Budget Planning Framework 2026/27

JHo explained that the report detailed information at the time of writing, but additional information had been received yesterday. JHo explained that there had been a delay due to the Autumn spending review.

JHo advised that the report detailed that the structure remained unchanged, with an expectation that LA's moved their local formula factor values to at least 10% closer to the National Funding Formula (NFF) – JHo reported that Sunderland's factors were within the allowed parameters, compared to the NFF factors in 2025/26.

JHo explained that the Schools Budget Support Grant (SBSG) and National Insurance Contributions (NIC) Grant would be rolled into the NFF for 2026/27, together with other core factors (examplng Ever6, Pupil Premium and Minimum Pupil Factors).

JHo explained that the technical information, received yesterday, but there was no Authority Proforma Tool (APT), therefore TfC was unable to work through the formulas for individual schools. JHo explained that he had calculated estimates.

JHo reported that there appeared to be an additional £7m and other factors had been increased, which equated to £5m, which equated to an approximate increase of 2.2% which, excluding grants, was slightly more than last year. JHo advised that schools should see an increase in funding, if their pupil numbers had remained stable.

JHo advised SSF Members that he did not believe the APT would be released until December, which would mean the December SSF meeting may not be required.

JHo acknowledged that a consistent process had been implemented for the transfer of 0.5% from the SB to the HNB and noted the comments received in relation to why schools should consider this. JHo advised SSF members that the DfE stipulated that Sunderland City Council must consult with all schools, but it was still the role of the SSF to agree or disagree to the proposal. JHo highlighted that it was ultimately Sunderland City Council who had the final say in the transfer of 0.5% to the HNB (and this would need to be considered by Cabinet) but usually the proposal was agreed by SSF Members.

JHo advised SSF Members that the report detailed the costs of the HNB and transfer, advising that 57 schools had responded to his e mail and 81% agreed to the proposal and 19% were against the proposal to transfer 0.5% to the HNB. JHo shared that some of the comments submitted were similar to previous comments received.

JHo noted that a White Paper was due to be released in relation to SEND reform but stated that he was uncertain whether this would have a positive impact.

DW advised SSF Members that she had discussed, with JHo, some concerns raised at the Secondary Headteacher meeting, in relation to voting processes. DW explained that SSF Members put forward a vote on behalf of their representative groups. DW explained that she believed there may have been some miscommunication in relation to the content of JHo's e mail being a consultation/voting process and SSF members would vote in line with the decisions taken by the groups they were representing.

CD stated that he was happy to agree the process, explaining that he sat in the SSF as group representative and would vote in line with the decisions taken by the group. CD noted that within both the Secondary Headteacher and SSF meetings in 2024/25 it was felt incumbent for reports to include as much information as possible, and to ensure this information was clear. CD stated that as part of the Audit and Assurance Working Party he felt work was being undertaken.

CD explained that as a Headteacher he needed to consider his students, and he felt that if there was going to be any dissent, a part of the process of the DBV was to spend money at the source of the problem and earlier interventions.

CD highlighted that the 0.5% equated to £57k for Kepier, which was a significant proportion, and he felt discussions may be needed in relation to utilising this funding within primary schools. CD explained that he believed there was a need to start thinking of problem resolutions differently, stating he felt there was increasing dissent about the transfer proposal because of a lack of knowledge and the fact SEND issues were increasing.

CD reiterated that he was in attendance at the SSF meeting as a representative of Secondary Headteachers and would vote accordingly.

MH noted that the report also detailed a second proposal to be considered, the de-delegation of trade union facility time. MH noted that there was a split decision on the de-delegation proposal last year and it was recommended that prior to a decision being made there would be a scrutiny process implemented. MH stated that he believed the LA maintained schools should have an individual vote on the de-delegation of trade union proposal and this should not be taken at source. MH shared that he had spoken to Members and Headteachers who agreed they would prefer the option of whether or not to take this forward, sharing that this proposal appeared to have been "snuck" in.

CJ advised that in terms of maintained Primary Schools this proposal had been discussed in detail, sharing that Trade Union representatives had attended meetings, and the suggestion by colleagues was this option should be available as a service level agreement.

LM advised Members that the SSF guidelines detailed the need to consider de-delegation, and this needed to be considered annually, in line with DfE guidelines. LM shared that if the

	<p>proposal to de-delegate trade union facility time was rejected this would be offered as a service level agreement.</p> <p>Following a voting process SSF Members RESOLVED:</p> <ul style="list-style-type: none"> - To approve the proposal to transfer 0.5% from the SB to the HNB. - To reject the continuation of the de-delegation of trade union facility time. <p>LM confirmed a service level option for the delegation of trade union time would be offered in September 2026.</p>	
25/55	<p><u>Any Other Business</u></p> <p><u>School Transport</u></p> <p>MH noted that a number of LA's had reviewed their transport arrangements for Post-16 pupils and questioned if there were any plans for Sunderland to follow suit and review their arrangements. KR advised that the Post-16 transport had been reviewed, as it was not a statutory requirement, and shared that she was aware other LA's had withdrawn this provision. KR explained that TfC had not withdrawn their Post-16 transport provision, but it had been reviewed in terms of reducing service options, in relation to implementing a single drop off to individual providers. KR shared that this change was implemented from September 2025 and only one concern had been submitted about the change.</p> <p><u>Elective Home Education (EHE)</u></p> <p>MH noted the Sara Sharif Serious Case Review and the growing number of EHE pupils and questioned if TfC had any arrangements in place to monitor the safeguarding of EHE children.</p> <p>RL acknowledged that the case of Sara Sharif was horrific, explaining that all safeguarding leads should be providing details of outcomes.</p> <p>RL explained that a key focus of the Inspection of Local Authority Children's Services (ILACS) Inspection, was held in January 2025, and TfC received an Outstanding judgement. RL stated that TfC's EHE processes were deemed to be secure and to meet needs.</p> <p>RL shared that EHE had been discussed within SEND meetings and provided assurance that robust processes were in place, in line with current legislation, but acknowledged this was due to be reviewed.</p> <p>RL explained that the current time the issue was with education placements, explaining that 40 children had returned to mainstream schools when plans were identified as unsuitable and shared that cases had been progressed through legal processes, where necessary.</p>	

	<p>RL informed MH TfC had a qualified teacher to support parents and children to ensure the educational plans in place were appropriate for EHE pupils.</p> <p>RL advised that at the moment TfC had limited statutory powers in relation to EHE pupils, exemplifying that they could not legally have a list of children being EHE'd and shared that TfC welcomed the changes expected to be implemented.</p> <p><u>SEND Inspection</u></p> <p>KR thanked colleagues for the support provided during the SEND Inspection.</p>	
25/56	<p><u>Date and Time of Next Meeting</u></p> <p>11th December 2025* 15th January 2026 19th February 2026* 12th March 2026 21st May 2026 9th July 2026</p> <p>*These meetings may be cancelled dependent on business need. Meeting time 8.30 am - Meetings will be held virtually</p>	

Subject TO Approval

Schools Forum Action Log

Date of Meeting	Agenda No	Request	Action	Responsible	Date of Completion	Remarks
18/09/2025	25/36	Welcome and Introductions	DW to invite nominations to join the School Forum at the next Secondary HT meeting.	DW		
18/09/2025	25/42	Feedback from Short Life Working Groups	DBV Funding - PR to share copies of the deficit plan, when completed, to members of the Audit and Assurance Sub Group	PR		
18/09/2025	25/46	Any Other Business	AR to re-circulate the proposals to change the School Admissions Co-Ordinator Scheme.	AR		
20/11/2025	25/52	Feedback from Short Life Working Groups	Copies of the DfE High Needs Funding guidance to be circulated.	DD	02/12/2025	

BUDGET PLANNING FRAMEWORK 2026/27

REPORT OF TOGETHER FOR CHILDREN FINANCE TEAM

12 January 2026

Purpose of the Report

To update Schools Forum on the final Schools Funding Formula and Early Years Formula for 2026/27.

Schools Block – School Funding Formula 2026/27

- 1.1 Local budget flexibility arrangements associated with the Schools Block ring-fence continue into 2026/27 and these allow for the Schools' Forum to agree a transfer up to 0.5% of their Schools Block funding to the High Needs Block (HNB). Sunderland School's Forum confirmed agreement to the transfer of 0.5% from the Schools Block to the HNB for 2026/27 at the meeting on 20 November 2025. This is in recognition of the ongoing demand on the HNB due to increasing numbers of pupils receiving an Education, Health and Care Plan and the movement of pupils to specialist settings including permanent exclusions, the increase in complexity of need in respect of Autism and SEMH, the increase in number post 16 commissioned places and top-ups and the increased cost of placements in non-maintained independent Special Schools.
- 1.2 Restrictions continue to be in place in the formula where Local Authorities must move their factor values 10% closer to the NFF values compared to the previous year. Sunderland's factor values, in 2025/26, were at full NFF (exact values) apart from the Basic Entitlement factor (AWPU) which was used in 2025/26 to transfer 0.5% to the HNB. Schools Forum should note that even though the AWPU factor has been reduced, it is still within the 2.5% parameter, therefore considered to be at full NFF factor values.
- 1.3 The Authority Proforma Tool (APT) was released 17 December along with 2026/27 funding allocations. No provisional APT was released prior to this which is normally used for modelling purposes. This was due to the late Autumn 2025 Spending review.

Funding Announcement

- 1.4 The Schools, High Needs, Central Services and Early Years Funding announcement on 17 December 2025 confirmed the following information compared with the previous year.

	2025/26	17-Dec Settlement 2026/27	Change in Funding
	£m	£m	£m
Schools Block	231.24	239.94	8.70
High Needs	37.34	41.39	4.05
Central Services	1.55	1.54	-0.01
Early Years	40.02	48.09	8.07
Total	310.15	330.96	20.81

The figures above are after deductions for NNDR and direct funding of HN places by DfE.

- 1.5 Funding provided to mainstream schools through the School Budget Support Grant (SBSG) and the National Insurance Grant (NICs) have been rolled into the schools NFF for 2026/27. This makes up the majority (£7m) of the £8.7m increase as shown in the table above plus additional Growth Funding.

The additional increase to the factor values amounts to approximately £1.5m, which is the true increase in funding after taking into account those grants which Schools were already receiving outside of the NFF.

It should be noted that pupil numbers have reduced by 559 from 2025/26 to 2026/27 (compared to a reduction of 277 in the current year).

Appendix D shows the effect of rolling in the grants.

- 1.6 The increase in Early Years Funding reflects the increase in funding rates for all entitlements.
- 1.7 The decrease in the Central Services Block is due to a 20% year-on-year reduction to historic commitments.
- 1.8 **High Needs Block**

Total national provisional funding for mainstream schools through the schools NFF will total £50.9 billion in 2026/27.

In 2026/27 DfE are temporarily suspending the high needs national funding formula, which in previous years DfE have used to calculate local authorities' high needs allocations.

Instead, local authorities' allocations will be based on their 2025/26 allocations, including funding equivalent to that received via grants in the 2025/26 financial year.

The 2026 multi-year funding settlement is significant for local government as it marks the first such agreement in a decade, enabling better long term planning. This settlement includes over £1.4 billion in funding specifically allocated for prevention and reform initiatives, addressing critical areas such as children's social care, the Special Education Needs and Disabilities (SEND) system, and homelessness and rough sleeping services.

The aim of this settlement is to establish firmer financial foundations for the sector through fair funding, updated indices and clearer links to local needs, with funding arrangements set for 3 years. However, despite these provisions, considerable uncertainty persists, particularly concerning how legacy and growing dedicated school grant deficits will be resolved. Local Government minister Alison McGovern promised details on how special educational needs deficits would be addressed as part of the broader SEND reform plans in 2026, tied to the final settlement due in February.

Schools Block

- 1.9 Following receipt of the Authority Proforma Tool (APT) and applying the new NFF rates, the formula again shows a shortfall in 2026/27, in the order of £1.504m (£504k in 2025/26).
- 1.10 This has occurred due to increases, particularly in Free School Meals (FSM & FSM6) and Primary Low Prior Attainment (LPA) between October 2024 and October 2025 Census data.

	Oct 2024 2025/26 Eligible	Oct 2025 2026/27 Eligible	Increase
FSM/FSM6	23,686	24,479	793
Primary LPA	6,536	6,784	248

- 1.11 The units of funding (PUFs, Primary units of funding and SUFs, Secondary units of funding), which drive the funding allocation for 2026/27, are based on October 2024 Census then uplifted with the new factor values and protection factors. These values are then multiplied by their respective October 2025 pupil counts to provide the final allocation for 2026/27.

Therefore, if there are substantial changes in pupil characteristics in October 2025 compared to October 2024 then the formula may become unaffordable.

- 1.12 To balance the formula, before any transfers are to be made, the Basic Entitlement factors have been reduced by £46.39 to:

- Primary £4,017.61, KS3 £5,639.61 and KS4 £6,363.61 (see the table in para 1.15 below for original NFF figures).

- 1.13 To enable the transfer to HNB of £1,199,683 the Basic Entitlement factors have been further reduced by £37.29 to:

- Primary £3,980.32, KS3 £5,602.32 and KS4 £6,326.32 to ensure most schools contribute the same value, £37.29 per pupil.

- 1.14 Schools that are protected by the Minimum per Pupil Funding factor and the Minimum Funding Guarantee continue to be so.

1.15 The following table shows the submitted Sunderland 2025/26 APT factor values compared with Sunderland's proposed APT submission for 2026/27.

Factor	2025/26 APT	2026/27 NFF	Sunderland Formula 2026/27	<i>Factor values must be at least 97.5% of NFF to be deemed full NFF</i>
Primary basic entitlement	£3,788.67	£4,064	£3,980.32	97.9%
KS3 basic entitlement	£5,363.67	£5,686	£5,602.32	98.5%
KS4 basic entitlement	£6,054.67	£6,410	£6,326.32	98.7%
Primary FSM	£495	£505	£505	100.0%
Secondary FSM	£495	£505	£505	100.0%
Primary FSM6	£1,060	£1,210	£1,210	100.0%
Secondary FSM6	£1,555	£1,725	£1,725	100.0%
Primary IDACI F	£235	£240	£240	100.0%
Primary IDACI E	£285	£290	£290	100.0%
Primary IDACI D	£445	£455	£455	100.0%
Primary IDACI C	£490	£500	£500	100.0%
Primary IDACI B	£520	£530	£530	100.0%
Primary IDACI A	£685	£700	£700	100.0%
Secondary IDACI F	£340	£345	£345	100.0%
Secondary IDACI E	£450	£460	£460	100.0%
Secondary IDACI D	£635	£650	£650	100.0%
Secondary IDACI C	£695	£710	£710	100.0%
Secondary IDACI B	£745	£760	£760	100.0%
Secondary IDACI A	£950	£970	£970	100.0%
Primary EAL	£595	£610	£610	100.0%
Secondary EAL	£1,595	£1,630	£1,630	100.0%
Primary LPA	£1,175	£1,200	£1,200	100.0%
Secondary LPA	£1,785	£1,825	£1,825	100.0%
Primary mobility	£965	£985	£985	100.0%
Secondary mobility	£1,385	£1,415	£1,415	100.0%
Primary lump sum	£145,100	£152,700	£152,700	100.0%
Secondary lump sum	£145,100	£152,700	£152,700	100.0%

1.16 The 2026/27 final proposed funding formula, following the affordability adjustment and the transfer of 0.5% to the HNB shows 89 Schools contribute £37.29 per pupil to the HNB, 1 School contributes less than this as any further contribution would take them below the MFG minimum funding protection. 9 schools do not contribute as they are being funded at or below the minimum protection levels (MFG and/or MPPL), therefore the formula will not allow any deductions to be made. These Schools are shown in Appendix B.

For comparison in 2025/26 there were 63 Schools who made the full contribution and 36 who made either no contribution or a reduced contribution.

1.17 The MFG this year can be set between -0.5% and 0%. This has been set at the maximum 0% in Sunderland's funding formula 2026/27 so that Schools should receive at least the same per pupil funding as they did for 2025/26.

Reconciliation

£241,867,523	DSG Allocation
-£1,930,880	Less Rates
-£1,199,683	Less 0.5% HNB Transfer
£238,736,960	APT Total
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-£874,840	Less Growth
£237,862,120	Allocated to Schools through formula

	October 2024 Pupils	October 2025 Pupils	Diff	Cost of transfer	2026/27 funding
Primaries	20,321	19,974	-347	-£620,869	£117,759,420
Secondaries	15,736	15,524	-212	-£578,814	£120,102,700
			-559	-£1,199,683	£237,862,120

Remainder of De Delegation for Trade Union Facility Time -£11,775
 Final Allocation £237,850,345

1.18 Summary of Schools Funding allocations for 2026/27 is shown in **Appendix A**.

1.19 Details of the deductions for the transfer to the High Needs Block can be found in **Appendix B**.

1.20 Final proposed APT to be approved is shown in **Appendix C**.

1.21 **Appendix D** shows the effect of rolling in the School Budget Support and National Insurance Grants. These grants have previously been paid outside of the formula. This shows what the true increases/decreases would be without those grants.

De-delegation of Trade Union Facility Time

At the meeting on 20 November 2025 Forum agreed to discontinue the delegation of Trades Union Facility Time from September 2026 allowing Maintained Schools to opt into an SLA for the service.

The consequence of this means 5/12ths will still need to be deducted from the 2026/27 formula to cover the period April 2026 to August 2026. This is shown on Appendix A.

Forum is to note that a decision on the de-delegation will still need to be made on an annual basis.

Early Years Funding Formula 2026/27

Current Early Years Entitlements

- 30 hours entitlement for eligible working parents of children from 9 months up to 2 years old.
- 30 hours entitlement for eligible working parents of 2 year old children.
- 15 hours entitlement for 2 year old disadvantaged children (now called the 15 hours entitlement for families of 2-year-olds receiving additional support).
- Universal 15 hours entitlement for all 3 and 4 year-old children.
- Additional 15 hours entitlement for working parents of 3 and 4 year-old children.
- Maintained nursery school (MNS) supplementary funding for 3 and 4 year-old children.
- The disability access fund (DAF) for eligible children accessing the early years entitlements.
- The early years pupil premium (EYPP) for eligible children and looked after children accessing the early years entitlements.

Changes 2026/27

- An increased minimum pass-through requirement for local authorities in 2026/27 - the pass-through rate will increase from 96% to 97%.
- Apart from the initial provisional funding, moving forward LAs will be funded on a termly basis in the format 13 weeks Summer, 14 weeks Autumn and 11 weeks Spring. This is instead of being funded on the January Census as in previous years.
- An expectation that local authorities will announce their funding rates to childcare providers by 28 February 2026.

The funding rates for 2026/27 Sunderland will receive are as follows:

	National Average 26/27	Sunderland 25/26	Sunderland 26/27	Increase from rates received as at Dec25
3 and 4-year-old entitlements	£6.61	£5.71	£6.20	£0.49
2-year-old entitlements	£8.90	£8.11	£8.48	£0.37
Under 2s entitlement	£12.04	£11.04	£11.52	£0.48
MNS Supplementary Funding	£6.11	£5.27	£5.47	£0.20
DAF	£975	£938	£975	£37
EYPP	£1.15	£1.00	£1.15	£0.15

Forum is to note that the rates above, other than DAF and EYPP, are not the rates that will be allocated to providers. These rates are the starting position for LAs, from which any supplements supplied, Early Years inclusion, retained element for central support functions and affordability are taken into account.

The table below shows how the rates received have changed over the last five years.

	2022/23	2023/24	2024/25	2025/26	2026/27
3 and 4-year-old entitlements	£5.04	£5.29	£5.49	£5.71	£6.20
2-year-old entitlements	£5.57	£7.27	£7.84	£8.11	£8.48
Under 2s entitlement	N/A	N/A	£10.69	£11.04	£11.52
MNS Supplementary Funding	£1.97	£4.01	£4.64	£5.27	£5.47
DAF	£800.00	£881.00	£910.00	£938.00	£975
EYPP	£0.60	£0.66	£0.68	£1.00	£1.15

DSG Indicative Funding Allocation for All Early Years entitlements

Entitlement	Indicative Funding
3 & 4 year old Funding universal hours	£12,792,621
3 & 4 year old Funding additional hours	£5,989,777
EYPP 3&4 year old	£651,397
DAF 3&4 year old	£308,100
Total 3&4 year old	£19,741,895
2 year olds receiving additional support	£3,301,253
2 year old working parent entitlement	£9,514,169
Under 2 year old working parent entitlement	£13,581,286
EYPP 2 year old	£289,731
EYPP under 2 year old	£29,550
DAF 2 year olds	£82,875
DAF under 2 year olds	£16,575
Total 2 year old and under	£26,815,439
MNS Supplementary Funding	£1,535,660
Total indicative Early Years Block 2026/27	£48,092,994

Structure of Sunderland's 2 year old and under formula

2-year-olds receiving additional support	Base Rate	Early Years Inclusion Fund	
Working parents of 2 years old children	Base Rate	Early Years Inclusion Fund	Retained element
Working parents of children from 9 months up to 2 years old	Base Rate	Early Years Inclusion Fund	Retained element

Structure of Sunderland's 3&4 year old formula

Universal and Additional 15 hours entitlement for all 3 and 4 year-old children	Base Rate	Early Years Inclusion Fund	Retained element	Supplements 12% max			
				IDACI	Flexibility	Quality	Rural

3 and 4 Year Old Funding

The basic formula to apply in 2026/27 remains unchanged from 2025/26. In 2026/27 LAs will be funded on a termly basis in the format of 13 weeks Summer, 14 weeks Autumn and 11 weeks Spring. This is instead of being funded on the January Census as in previous years. The principles are as follows:

- Universal Base Rate - A single rate to be paid to all providers
- Supplementary Factors (Capped at 12%);
 - Deprivation (Mandatory) - IDACI Rates £0 - £570 p.a. (£0.00 to £1.00 p/hr based on post code of child).
 - Flexibility – £0.50 per hour to apply to those children taking up the flexible offer. Paid to providers offering 42 weeks or more per year.
 - Rural Schools Protection – Sustainability – East Rainton Primary School
 - Quality (formerly Teachers Pay and Pensions Grant TPPG) both Universal and additional entitlements for schools who previously received TPPG prior to being rolled into the Early Years formula.
- Nursery Supplementary Funding

The base rate for 3 and 4 year olds will be increased from £4.90 to **£5.40** per hour for all providers. An increase of **£0.50** per hour (£285 per 15 hr child per annum, £570 per 30 hr child per annum)

An element has been added to the base rate received for the Early Years national insurance contributions and teachers pay grant (EYNTPG), due to the Supplements being capped at 12% it is no longer possible to increase the supplements for this. Therefore, the increase shown above will go to all providers.

Initial 3 and 4 Year old allocations and estimated spend 2026/27

Reconciliation	3 and 4 year old	
Estimated Hours	2,899,426	
Hourly Rate @ £5.40	£15,656,898	
Deprivation	£695,000	Supplements total £2,065,500/Formula Funding =11.7%
Flexibility	£295,000	
Quality	£1,045,500	
Rural	£30,000	
Formula Funding	£17,722,398	
SEN Inclusion	£500,000	
Funding to Providers	£18,222,398	
Central Team Retained	£560,000	
Total	£18,782,398	

DSG 17-12-25	£18,782,398
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Retained	£560,000
Divided by DSG Total	£18,782,398
Retained %	2.98%
Passthrough	97.02%

Other Funding

EYPP	£651,397
DAF	£308,100

Total Funding for 3 & 4 Year olds	£19,741,895
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Summary of 3 & 4 Year Old Rates

	2026/27	
Base Rate	£5.40 p/hr	Universal & Additional 15hrs
IDACI	£0-£1 p/hr	Universal & Additional 15hrs
Flexibility	£0.50 p/hr	Universal & Additional 15hrs
Quality	£0.58 p/hr	Universal & Additional 15hrs
DAF	£975 p.a.	N/A
EYPP	£1.15 p/hr	Universal 15hrs only

Maintained Nursery School Lump Sum

Sunderland's multiplying rate is currently £5.27; this will rise to **£5.47**. Current Lump Sum, £190,950 per seven Maintained Nursery Schools will increase to **£193,666**.

The rate per hour for the quality supplement will be **£0.58** for both the Universal and Additional entitlements to be in line with other schools.

MNS Reconciliation

DSG 17-12-25	£1,535,660
Lump Sum (£193,666 x 7)	£1,355,660
Quality @ £0.58 p/hr	£180,000
	<hr/>
	£1,535,660

Funding for 2 Year Olds and under

The early years entitlements are:

- 15 hours entitlement for 2-year-olds receiving additional support.
- 30 hours entitlement for eligible working parents of 2-year-old children.
- 30 hours entitlement for eligible working parents of children from 9 months to 2 years.
- Early Years Pupil Premium (15hrs only)
- Disability Access fund

For 2026/27 the 2 year old and under rates will change by:

increasing the base rate for 2 year olds requiring additional support from £8.08 to **£8.43** per hour. An increase of **£0.35** per hour.

increasing the base rate for working parents of 2 year olds from £8.00 to **£8.35** per hour. An increase of **£0.35** per hour.

increasing the base rate for working parents of under 2 year old from £10.95 to **£11.40** per hour. An increase of **£0.45** per hour.

Initial 2 year olds and under allocations and estimated spend 2026/27

Reconciliation	2 year old - Disadvantaged	2 year old - Working parents	Under 2s - Working parents	Total
DSG 17-12-25	£3,301,253	£9,514,169	£13,581,286	£26,396,708
SEN Inclusion	£20,000	£20,000	£20,000	
Central Team Retained		£120,000	£120,000	
Funding remaining for providers	£3,281,253	£9,374,169	£13,441,286	
Divided by estimated hours	389,298	1,122,954	1,178,931	
Rate for providers	£8.43	£8.35	£11.40	
Retained	0.00%	1.28%	0.89%	
Passthrough	100.00%	98.72%	99.11%	
Other Funding				
EYPP	£289,731		£29,550	£319,281
DAF	£82,875		£16,575	£99,450

Total DSG £26,815,439

Summary

2 year old - receiving additional support	£8.43
2 year old - Working parents	£8.35
Under 2s - Working parents	£11.40

Early Years Pupil Premium (EYPP)

The EYPP remains distinct from the Early Year's National Funding Formula and will continue as a separate funding stream provided to Local Authorities in order to support disadvantaged pupils. The funding will continue to be paid within the DSG and has been increased to **£1.15** per hour (**£655.00** p.a.). The EYPP is only paid on the universal 15 hours. This is available to all entitlements.

Disability Access fund (DAF) is increasing by £37 from £938 to **£975** for all entitlements.

Summary of all rates 2026/27

Entitlement	Rate p/hr
3 and 4-year-old entitlements Base	£5.40
3 and 4-year-old IDACI	£0 - £1
3 and 4-year-old Flexibility	£0.50
3 and 4-year-old Quality	£0.58
2-year-old entitlements- receiving additional support	£8.43
2-year-old entitlements-Working Parents	£8.35
Under 2s entitlement	£11.40
DAF	£975.00
EYPP	£1.15

Payment Mechanism and Term Dates

Early Years payments will continue to be offered either on a termly or monthly basis. Providers will remain on the current payment method unless a change is requested. Changes to the payment method cannot be made mid-term but will come into effect the following term if required.

The maximum 38 week funding allocation will be funded on the basis of 13 weeks (195 hours) in Summer, 14 weeks (210 hours) in Autumn and 11 weeks (165 hours) in Spring.

This is to both match the school term dates as close as possible and also the way we are to be funded by the DfE.

Summer Term 2026	13 Weeks				Maximum Funding	
	From			To		
Early Years dates	Monday	20/04/2026	Friday	24/07/2026	195 hours	13 Wks
<i>School dates</i>	<i>Monday</i>	<i>20/04/2026</i>	<i>Wednesday</i>	<i>22/07/2026</i>		12 Wks & 3 days
	<i>H/Term</i>	<i>24/05/2026</i>	<i>to</i>	<i>28/05/2026</i>		

Autumn Term 2026	14 Weeks				Maximum Funding	
	From			To		
Early Years dates	Monday	31/08/2026	Friday	11/12/2026	210 hours	14 Wks
<i>School dates</i>	<i>Tuesday</i>	<i>01/09/2026</i>	<i>Friday</i>	<i>18/12/2026</i>		14 Wks & 4 days
	<i>H/Term</i>	<i>26/10/2026</i>	<i>to</i>	<i>30/10/2026</i>		

Spring Term 2027	11 Weeks				Maximum Funding	
	From			To		
Early Years dates	Monday	04/01/2027	Friday	26/03/2027	165 hours	11 Wks
<i>School dates</i>	<i>Monday</i>	<i>04/01/2027</i>	<i>Thursday</i>	<i>25/03/2027</i>		10 Wks & 4 days
	<i>H/Term</i>	<i>15/02/2027</i>	<i>to</i>	<i>19/02/2027</i>		

Payment Dates

Payment dates for monthly and termly options are as follows:

12 Monthly Payments					
Summer	07-Apr-26	12-May-26	16-Jun-26	07-Jul-26	11-Aug-26
Autumn	01-Sep-26	13-Nov-26	10-Nov-26	08-Dec-26	
Spring	05-Jan-27	09-Feb-27	09-Mar-27		

6 Termly Payments		
Summer	07-Apr-26	16-Jun-26
Autumn	01-Sep-26	10-Nov-26
Spring	05-Jan-27	09-Feb-27

Recommendation

Schools Forum is asked to:

- i. Agree to the submission of the Local Funding Formula proforma (APT) to the DfE by 22 January 2026, formula subject to Cabinet approval.
- ii. Agree the Early Years Formula for 2026/27.

SUNDERLAND SCHOOLS FUNDING FORMULA 2026/27

APPENDIX A

	£229,305,782	36057	35498	-559	£237,862,120	3.73%	-£11,774.58	£237,850,345	
	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Post transfer to HNB	% Cash increase	Remainder of Union De-del to Aug 26	Final Allocations 2026/27	Change in funding YoY
Albany Village Primary School	£1,157,135.96	194	190	-4	£1,197,058.00	3.45%	-£277.08	£1,196,780.92	£39,922.04
Barmston Village Primary School	£1,210,594.08	183	185	2	£1,311,793.83	8.36%	-£269.79	£1,311,524.04	£101,199.75
Barnes Infant Academy	£1,302,832.18	240	246	6	£1,391,687.08	6.82%		£1,391,687.08	£88,854.90
Barnes Junior School	£1,927,842.74	360	350	-10	£1,987,126.85	3.08%	-£510.42	£1,986,616.43	£59,284.12
Barnwell Academy	£1,109,517.62	209	210	1	£1,161,736.05	4.71%		£1,161,736.05	£52,218.43
Benedict Biscop CofE Academy	£1,352,715.00	273	290	17	£1,483,350.00	9.66%		£1,483,350.00	£130,635.00
Bernard Gilpin Primary School	£2,109,339.00	426	417	-9	£2,140,844.41	1.49%	-£608.13	£2,140,236.28	£31,505.41
Bexhill Academy	£1,758,122.81	294	297	3	£1,868,893.88	6.30%		£1,868,893.88	£110,771.08
Biddick Primary School	£1,324,931.15	260	267	7	£1,455,607.40	9.86%	-£389.38	£1,455,218.03	£130,676.25
Blackfell Primary School	£806,806.13	137	124	-13	£801,368.83	-0.67%	-£180.83	£801,188.00	-£5,437.30
Broadway Junior School	£1,384,509.96	238	225	-13	£1,424,805.68	2.91%	-£328.13	£1,424,477.55	£40,295.72
Burnside Academy Inspires	£900,012.21	144	149	5	£974,349.39	8.26%		£974,349.39	£74,337.18
Castletown Primary School	£1,805,529.70	333	312	-21	£1,827,243.56	1.20%	-£455.00	£1,826,788.56	£21,713.86
Dame Dorothy Primary School	£1,055,503.81	184	159	-25	£1,004,884.19	-4.80%		£1,004,884.19	-£50,619.62
Diamond Hall Infant Academy	£1,538,381.98	255	225	-30	£1,481,775.84	-3.68%		£1,481,775.84	-£56,606.15
Diamond Hall Junior Academy	£1,878,865.80	326	327	1	£2,025,297.09	7.79%		£2,025,297.09	£146,431.29
Dubmire Primary	£1,946,375.88	370	389	19	£2,187,107.07	12.37%		£2,187,107.07	£240,731.19
Easington Lane Primary School	£1,498,419.28	251	226	-25	£1,450,522.56	-3.20%	-£329.58	£1,450,192.97	-£47,896.72
East Herrington Primary Academy	£2,071,190.00	418	416	-2	£2,167,480.23	4.65%		£2,167,480.23	£96,290.23
East Rainton Primary School	£632,232.32	101	94	-7	£625,736.10	-1.03%	-£137.08	£625,599.02	-£6,496.21
English Martyrs' Catholic Primary	£1,073,527.76	169	159	-10	£1,066,004.42	-0.70%		£1,066,004.42	-£7,523.34
Eppleton Academy Primary School	£1,087,806.63	188	186	-2	£1,128,066.63	3.70%		£1,128,066.63	£40,260.00
Farringdon Academy	£1,844,396.01	317	347	30	£2,138,264.95	15.93%		£2,138,264.95	£293,868.94
Fatfield Academy	£1,051,118.04	198	207	9	£1,147,312.09	9.15%		£1,147,312.09	£96,194.05
Fulwell Infant School Academy	£1,332,895.00	269	270	1	£1,381,050.00	3.61%		£1,381,050.00	£48,155.00
Fulwell Junior School	£1,733,025.00	350	349	-1	£1,785,135.00	3.01%	-£508.96	£1,784,626.04	£52,110.00
George Washington Primary School	£2,216,901.48	406	381	-25	£2,228,447.19	0.52%		£2,228,447.19	£11,545.70
Gillas Lane Primary Academy	£823,893.75	119	117	-2	£854,238.69	3.68%		£854,238.69	£30,344.94
Grange Park Primary School	£1,272,771.66	204	179	-25	£1,198,393.54	-5.84%	-£261.04	£1,198,132.50	-£74,378.12
Grangetown Primary School	£1,454,777.10	246	238	-8	£1,526,136.75	4.91%	-£347.08	£1,525,789.66	£71,359.65

SUNDERLAND SCHOOLS FUNDING FORMULA 2026/27

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	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Post transfer to HNB	% Cash increase	Remainder of Union De-del to Aug 26	Final Allocations 2026/27	Change in funding YoY
Grindon Infant School	£823,796.26	128	115	-13	£808,798.47	-1.82%	-£167.71	£808,630.76	-£14,997.79
Hasting Hill Academy	£1,177,379.00	178	183	5	£1,278,476.04	8.59%		£1,278,476.04	£101,097.04
Hetton Lyons Primary School	£2,244,786.08	428	423	-5	£2,333,522.33	3.95%		£2,333,522.33	£88,736.25
Hetton Primary School	£1,082,750.00	174	174	0	£1,143,088.55	5.57%	-£253.75	£1,142,834.80	£60,338.55
Highfield Academy	£2,272,639.64	384	377	-7	£2,357,316.37	3.73%		£2,357,316.37	£84,676.73
Hill View Infant Academy	£1,689,655.00	341	340	-1	£1,739,100.00	2.93%		£1,739,100.00	£49,445.00
Hill View Junior Academy	£2,234,705.00	451	454	3	£2,322,439.49	3.93%		£2,322,439.49	£87,734.49
Holley Park Academy	£983,550.48	191	188	-3	£1,021,123.42	3.82%		£1,021,123.42	£37,572.94
Hudson Road Primary School	£1,794,663.53	305	305	0	£1,956,299.04	9.01%	-£444.79	£1,955,854.24	£161,635.50
Hylton Castle Primary School	£1,234,382.05	205	205	0	£1,330,742.50	7.81%	-£298.96	£1,330,443.54	£96,360.45
John F Kennedy Primary School	£2,043,348.48	383	378	-5	£2,148,619.67	5.15%		£2,148,619.67	£105,271.20
Lambton Primary School	£914,966.02	161	156	-5	£962,344.08	5.18%	-£227.50	£962,116.58	£47,378.06
Marlborough Primary School	£908,577.33	125	119	-6	£904,052.12	-0.50%	-£173.54	£903,878.58	-£4,525.21
Mill Hill Primary School	£2,109,339.00	426	434	8	£2,233,506.45	5.89%	-£632.92	£2,232,873.53	£124,167.45
New Penshaw Academy	£782,505.51	119	103	-16	£724,940.16	-7.36%		£724,940.16	-£57,565.35
New Silksworth Academy Infant	£780,579.43	132	128	-4	£809,387.62	3.69%		£809,387.62	£28,808.20
New Silksworth Academy Junior	£1,208,183.08	207	194	-13	£1,201,369.01	-0.56%		£1,201,369.01	-£6,814.07
Newbottle Primary Academy	£1,942,360.00	392	404	12	£2,074,642.20	6.81%		£2,074,642.20	£132,282.20
Northern Saints CofE Academy	£2,669,572.58	455	420	-35	£2,649,699.97	-0.74%		£2,649,699.97	-£19,872.61
Our Lady Queen of Peace Catholic Prim	£1,370,121.88	275	268	-7	£1,400,680.31	2.23%		£1,400,680.31	£30,558.44
Oxclose Primary Academy	£1,142,065.90	185	182	-3	£1,190,305.75	4.22%		£1,190,305.75	£48,239.85
Plains Farm Academy	£1,048,214.34	164	154	-10	£1,051,024.68	0.27%		£1,051,024.68	£2,810.34
Redby Academy	£1,258,358.86	248	221	-27	£1,193,888.31	-5.12%		£1,193,888.31	-£64,470.55
Richard Avenue Primary School	£2,244,925.37	412	405	-7	£2,297,966.17	2.36%	-£590.63	£2,297,375.54	£53,040.80
Rickleton Primary School	£1,841,958.00	372	390	18	£1,994,850.00	8.30%	-£568.75	£1,994,281.25	£152,892.00
Ryhope Infant School Academy	£664,278.78	104	95	-9	£665,356.02	0.16%		£665,356.02	£1,077.24
Ryhope Junior School	£1,026,404.92	168	159	-9	£1,041,834.59	1.50%	-£231.88	£1,041,602.72	£15,429.67
Seaburn Dene Primary School	£993,158.88	195	191	-4	£1,028,027.28	3.51%	-£278.54	£1,027,748.74	£34,868.40
Shiney Row Primary School	£1,317,993.45	218	220	2	£1,403,342.08	6.48%	-£320.83	£1,403,021.24	£85,348.63
South Hylton Primary Academy	£1,257,952.32	218	221	3	£1,345,205.88	6.94%		£1,345,205.88	£87,253.56
Southwick Community Primary School	£1,864,750.93	282	270	-12	£1,904,636.49	2.14%	-£393.75	£1,904,242.74	£39,885.57

SUNDERLAND SCHOOLS FUNDING FORMULA 2026/27

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	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Post transfer to HNB	% Cash increase	Remainder of Union De-del to Aug 26	Final Allocations 2026/27	Change in funding YoY
Springwell Village Primary School	£900,488.48	173	172	-1	£945,470.76	5.00%		£945,470.76	£44,982.29
St Anne's Roman Catholic VA Primary	£1,214,202.04	212	211	-1	£1,272,001.06	4.76%	£-307.71	£1,271,693.35	£57,799.02
St Bede's Catholic Primary School	£1,038,761.45	198	185	-13	£1,041,672.06	0.28%		£1,041,672.06	£2,910.61
St Benet's Roman Catholic VA Primary	£1,435,935.00	290	267	-23	£1,377,362.71	-4.08%	£-389.38	£1,376,973.34	£-58,572.29
St Cuthbert's Catholic Primary	£1,116,711.20	206	210	4	£1,205,656.13	7.96%		£1,205,656.13	£88,944.93
St John Bosco Catholic Primary School	£1,027,669.05	178	174	-4	£1,067,658.95	3.89%		£1,067,658.95	£39,989.90
St John Boste Catholic Primary School	£929,448.65	169	167	-2	£951,311.44	2.35%		£951,311.44	£21,862.79
St Joseph's Catholic Primary, S'land	£1,172,112.75	213	211	-2	£1,230,039.03	4.94%		£1,230,039.03	£57,926.28
St Joseph's Catholic Primary, W'ton	£1,062,175.09	208	201	-7	£1,087,742.06	2.41%		£1,087,742.06	£25,566.97
St Leonard's Catholic Primary School	£1,033,431.20	187	201	14	£1,168,106.32	13.03%		£1,168,106.32	£134,675.12
St Mary's Catholic Primary School	£2,086,055.00	421	419	-2	£2,143,185.00	2.74%		£2,143,185.00	£57,130.00
St Michael's Catholic Primary School	£1,030,484.75	198	193	-5	£1,048,956.74	1.79%		£1,048,956.74	£18,472.00
St Patrick's Catholic Primary School	£931,153.46	160	184	24	£1,090,887.80	17.15%		£1,090,887.80	£159,734.34
St Paul's CofE Primary School	£1,377,108.22	278	288	10	£1,488,492.19	8.09%	£-420.00	£1,488,072.19	£111,383.98
Thorney Close Primary School	£1,527,933.63	249	248	-1	£1,614,918.34	5.69%	£-361.67	£1,614,556.67	£86,984.71
Town End Academy	£1,152,849.37	185	175	-10	£1,181,531.69	2.49%		£1,181,531.69	£28,682.32
Usworth Colliery Primary School	£2,127,432.50	353	333	-20	£2,161,177.56	1.59%	£-485.63	£2,160,691.93	£33,745.06
Valley Road Academy	£1,928,696.72	318	300	-18	£1,902,642.34	-1.35%		£1,902,642.34	£-26,054.37
Wessington Primary School	£1,170,748.87	195	179	-16	£1,154,809.40	-1.36%	£-261.04	£1,154,548.35	£-15,939.47
Willow Wood Community Primary I	£1,574,770.17	242	249	7	£1,687,496.05	7.16%	£-363.13	£1,687,132.93	£112,725.89

SUNDERLAND SCHOOLS FUNDING FORMULA 2026/27

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	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Post transfer to HNB	% Cash increase	Remainder of Union De-del to Aug 26	Final Allocations 2026/27	Change in funding YoY
Academy 360	£6,594,118.83	882	863	-19	£6,717,930.80	1.88%		£6,717,930.80	£123,811.98
Biddick Academy	£7,756,236.70	1096	1029	-67	£7,564,500.66	-2.47%		£7,564,500.66	-£191,736.04
Castle View Enterprise Academy	£8,032,193.44	1037	1005	-32	£8,166,477.20	1.67%		£8,166,477.20	£134,283.76
Christ's College	£5,146,671.18	776	787	11	£5,533,488.06	7.52%		£5,533,488.06	£386,816.88
Farringdon Community Academy	£5,066,127.23	671	716	45	£5,618,405.04	10.90%		£5,618,405.04	£552,277.81
Hetton Academy	£5,164,534.74	674	673	-1	£5,420,751.64	4.96%		£5,420,751.64	£256,216.90
Kepier	£8,171,459.38	1140	1147	7	£8,636,966.32	5.70%		£8,636,966.32	£465,506.93
Monkwearmouth Academy	£5,816,676.66	816	817	1	£6,059,810.00	4.18%		£6,059,810.00	£243,133.34
Oxclose Community Academy	£7,881,462.66	1082	1031	-51	£7,904,529.69	0.29%		£7,904,529.69	£23,067.04
Red House Academy	£3,770,904.43	448	442	-6	£3,916,967.97	3.87%		£3,916,967.97	£146,063.54
Sandhill View Academy	£7,199,545.51	767	750	-17	£7,410,715.55	2.93%		£7,410,715.55	£211,170.04
Southmoor Academy	£8,615,980.71	1204	1210	6	£9,172,665.82	6.46%		£9,172,665.82	£556,685.11
St Aidan's Catholic Academy	£5,899,873.66	859	924	65	£6,619,375.80	12.20%		£6,619,375.80	£719,502.14
St Anthony's Girls' Catholic Academy	£7,348,472.04	1090	1087	-3	£7,731,457.02	5.21%		£7,731,457.02	£382,984.98
St Robert of Newminster Catholic Schl	£8,009,562.40	1198	1142	-56	£8,018,001.63	0.11%		£8,018,001.63	£8,439.23
Thornhill Academy	£4,582,307.62	554	528	-26	£4,600,118.51	0.39%		£4,600,118.51	£17,810.88
Venerable Bede CofE Academy	£5,973,167.65	848	748	-100	£5,604,537.17	-6.17%		£5,604,537.17	-£368,630.48
Washington Academy	£4,848,427.80	594	625	31	£5,406,001.20	11.50%		£5,406,001.20	£557,573.40
Primary Schools		20321	19974	-347	£117,759,419				
Secondary Schools		15736	15524	-212	£120,102,700				
		36057	35498	-559	£237,862,120				

Minimum Per Pupil Level Funding (MPPL)

In year funding protection, Primary Schools must receive at least £5115 per pupil, Secondaries £6640 per pupil. If not, the Schools are 'topped up' so that they are receiving the minimum values. This affects Schools who attract low levels of deprivation/additional needs funding compared to other Schools.

Minimum Funding Guarantee (MFG)

Year on Year protection. Schools must receive at least the same (0%) per pupil as they did last year. If not, again the Schools are 'topped up' so that they are receiving funding at the same level.

This can affect Schools who see a drop in deprivation/additional needs funding from one year to the next, i.e. a change in pupil characteristics from one year to the next.

The following shows the 10 schools that receive these top-ups. The formula will not allow any deductions from these Schools apart from one School, where a partial deduction can be made. This Schools MFG was slightly above 0% before the HNB transfer was implemented which allowed a smaller amount to be deducted.

The protections above do not protect schools that see a reduction in pupil numbers.

	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Cost of transfer	Per pupil	Post transfer to HNB	MPPL Adjustment	MFG Adjustment	
Benedict Biscop CofE Academy	273	290	17	£0.00	£0.00	£1,483,350.00	£38,890.54	£0.00	Protected by MPPL
Bernard Gilpin Primary School	426	417	-9	£0.00	£0.00	£2,140,844.41	£11,113.03	£7,889.41	Protected by MPPL & MFG
Fulwell Infant School Academy	269	270	1	£0.00	£0.00	£1,381,050.00	£27,107.29	£0.00	Protected by MPPL
Fulwell Junior School	350	349	-1	£0.00	£0.00	£1,785,135.00	£69,060.81	£0.00	Protected by MPPL
Hill View Infant Academy	341	340	-1	£0.00	£0.00	£1,739,100.00	£31,632.59	£0.00	Protected by MPPL
Hill View Junior Academy	451	454	3	£0.00	£0.00	£2,322,439.49	£42,957.03	£229.49	Protected by MPPL & MFG
Rickleton Primary School	372	390	18	£0.00	£0.00	£1,994,850.00	£60,179.64	£0.00	Protected by MPPL
St Benet's Roman Catholic VA Primary	290	267	-23	-£1,525.54	-£5.71	£1,377,362.71	£0.00	£8,429.59	Partially Protected by MFG
St John Boste Catholic Primary School	169	167	-2	£0.00	£0.00	£951,311.44	£0.00	£6,331.42	Protected by MFG
St Mary's Catholic Primary School	421	419	-2	£0.00	£0.00	£2,143,185.00	£20,566.80	£0.00	Protected by MPPL

The following pages show the cost of the transfer for all Schools.

ANALYSIS OF HIGH NEEDS TRANSFER COSTS

APPENDIX B

	£229,305,782 2025/26	£239,061,803 Pre Transfer	-£1,199,683 Cost of transfer	Per pupil	£237,862,120 Post transfer to HNB	% Cash increase
Albany Village Primary School	£1,157,135.96	£1,204,142.17	-£7,084.17	-£37.29	£1,197,058.00	3.45%
Barmston Village Primary School	£1,210,594.08	£1,318,691.58	-£6,897.75	-£37.29	£1,311,793.83	8.36%
Barnes Infant Academy	£1,302,832.18	£1,400,859.22	-£9,172.14	-£37.29	£1,391,687.08	6.82%
Barnes Junior School	£1,927,842.74	£2,000,176.64	-£13,049.79	-£37.29	£1,987,126.85	3.08%
Barnwell Academy	£1,109,517.62	£1,169,565.92	-£7,829.88	-£37.29	£1,161,736.05	4.71%
Benedict Biscop CofE Academy	£1,352,715.00	£1,483,350.00	£0.00	£0.00	£1,483,350.00	9.66%
Bernard Gilpin Primary School	£2,109,339.00	£2,140,844.41	£0.00	£0.00	£2,140,844.41	1.49%
Bexhill Academy	£1,758,122.81	£1,879,967.57	-£11,073.68	-£37.29	£1,868,893.88	6.30%
Biddick Primary School	£1,324,931.15	£1,465,562.53	-£9,955.13	-£37.29	£1,455,607.40	9.86%
Blackfell Primary School	£806,806.13	£805,992.19	-£4,623.36	-£37.29	£801,368.83	-0.67%
Broadway Junior School	£1,384,509.96	£1,433,194.83	-£8,389.15	-£37.29	£1,424,805.68	2.91%
Burnside Academy Inspires	£900,012.21	£979,904.88	-£5,555.48	-£37.29	£974,349.39	8.26%
Castletown Primary School	£1,805,529.70	£1,838,876.52	-£11,632.96	-£37.29	£1,827,243.56	1.20%
Dame Dorothy Primary School	£1,055,503.81	£1,010,812.53	-£5,928.33	-£37.29	£1,004,884.19	-4.80%
Diamond Hall Infant Academy	£1,538,381.98	£1,490,164.99	-£8,389.15	-£37.29	£1,481,775.84	-3.68%
Diamond Hall Junior Academy	£1,878,865.80	£2,037,489.32	-£12,192.24	-£37.29	£2,025,297.09	7.79%
Dubmire Primary	£1,946,375.88	£2,201,610.98	-£14,503.91	-£37.29	£2,187,107.07	12.37%
Easington Lane Primary School	£1,498,419.28	£1,458,948.99	-£8,426.44	-£37.29	£1,450,522.56	-3.20%
East Herrington Primary Academy	£2,071,190.00	£2,182,990.84	-£15,510.61	-£37.29	£2,167,480.23	4.65%
East Rainton Primary School	£632,232.32	£629,240.90	-£3,504.80	-£37.29	£625,736.10	-1.03%
English Martyrs' Catholic Primary	£1,073,527.76	£1,071,932.75	-£5,928.33	-£37.29	£1,066,004.42	-0.70%
Eppleton Academy Primary School	£1,087,806.63	£1,135,001.66	-£6,935.03	-£37.29	£1,128,066.63	3.70%
Farringdon Academy	£1,844,396.01	£2,151,202.89	-£12,937.94	-£37.29	£2,138,264.95	15.93%
Fatfield Academy	£1,051,118.04	£1,155,030.11	-£7,718.02	-£37.29	£1,147,312.09	9.15%
Fulwell Infant School Academy	£1,332,895.00	£1,381,050.00	£0.00	£0.00	£1,381,050.00	3.61%
Fulwell Junior School	£1,733,025.00	£1,785,135.00	£0.00	£0.00	£1,785,135.00	3.01%
George Washington Primary School	£2,216,901.48	£2,242,652.82	-£14,205.63	-£37.29	£2,228,447.19	0.52%
Gillas Lane Primary Academy	£823,893.75	£858,601.05	-£4,362.36	-£37.29	£854,238.69	3.68%
Grange Park Primary School	£1,272,771.66	£1,205,067.58	-£6,674.04	-£37.29	£1,198,393.54	-5.84%
Grangetown Primary School	£1,454,777.10	£1,535,010.61	-£8,873.86	-£37.29	£1,526,136.75	4.91%

ANALYSIS OF HIGH NEEDS TRANSFER COSTS

APPENDIX B

	2025/26	Pre Transfer	Cost of transfer	Per pupil	Post transfer to HNB	% Cash increase
Grindon Infant School	£823,796.26	£813,086.26	-£4,287.79	-£37.29	£808,798.47	-1.82%
Hasting Hill Academy	£1,177,379.00	£1,285,299.22	-£6,823.18	-£37.29	£1,278,476.04	8.59%
Hetton Lyons Primary School	£2,244,786.08	£2,349,293.94	-£15,771.61	-£37.29	£2,333,522.33	3.95%
Hetton Primary School	£1,082,750.00	£1,149,576.16	-£6,487.61	-£37.29	£1,143,088.55	5.57%
Highfield Academy	£2,272,639.64	£2,371,372.86	-£14,056.49	-£37.29	£2,357,316.37	3.73%
Hill View Infant Academy	£1,689,655.00	£1,739,100.00	£0.00	£0.00	£1,739,100.00	2.93%
Hill View Junior Academy	£2,234,705.00	£2,322,439.49	£0.00	£0.00	£2,322,439.49	3.93%
Holley Park Academy	£983,550.48	£1,028,133.03	-£7,009.60	-£37.29	£1,021,123.42	3.82%
Hudson Road Primary School	£1,794,663.53	£1,967,671.00	-£11,371.96	-£37.29	£1,956,299.04	9.01%
Hylton Castle Primary School	£1,234,382.05	£1,338,385.95	-£7,643.45	-£37.29	£1,330,742.50	7.81%
John F Kennedy Primary School	£2,043,348.48	£2,162,713.45	-£14,093.78	-£37.29	£2,148,619.67	5.15%
Lambton Primary School	£914,966.02	£968,160.56	-£5,816.48	-£37.29	£962,344.08	5.18%
Marlborough Primary School	£908,577.33	£908,489.05	-£4,436.93	-£37.29	£904,052.12	-0.50%
Mill Hill Primary School	£2,109,339.00	£2,249,688.19	-£16,181.74	-£37.29	£2,233,506.45	5.89%
New Penshaw Academy	£782,505.51	£728,780.53	-£3,840.37	-£37.29	£724,940.16	-7.36%
New Silksworth Academy Infant	£780,579.43	£814,160.12	-£4,772.50	-£37.29	£809,387.62	3.69%
New Silksworth Academy Junior	£1,208,183.08	£1,208,602.33	-£7,233.31	-£37.29	£1,201,369.01	-0.56%
Newbottle Primary Academy	£1,942,360.00	£2,089,705.40	-£15,063.19	-£37.29	£2,074,642.20	6.81%
Northern Saints CofE Academy	£2,669,572.58	£2,665,359.72	-£15,659.75	-£37.29	£2,649,699.97	-0.74%
Our Lady Queen of Peace Catholic	£1,370,121.88	£1,410,672.73	-£9,992.41	-£37.29	£1,400,680.31	2.23%
Oxclose Primary Academy	£1,142,065.90	£1,197,091.64	-£6,785.89	-£37.29	£1,190,305.75	4.22%
Plains Farm Academy	£1,048,214.34	£1,056,766.59	-£5,741.91	-£37.29	£1,051,024.68	0.27%
Redby Academy	£1,258,358.86	£1,202,128.32	-£8,240.01	-£37.29	£1,193,888.31	-5.12%
Richard Avenue Primary School	£2,244,925.37	£2,313,066.64	-£15,100.48	-£37.29	£2,297,966.17	2.36%
Rickleton Primary School	£1,841,958.00	£1,994,850.00	£0.00	£0.00	£1,994,850.00	8.30%
Ryhope Infant School Academy	£664,278.78	£668,898.10	-£3,542.09	-£37.29	£665,356.02	0.16%
Ryhope Junior School	£1,026,404.92	£1,047,762.93	-£5,928.33	-£37.29	£1,041,834.59	1.50%
Seaburn Dene Primary School	£993,158.88	£1,035,148.74	-£7,121.46	-£37.29	£1,028,027.28	3.51%
Shiney Row Primary School	£1,317,993.45	£1,411,544.81	-£8,202.73	-£37.29	£1,403,342.08	6.48%
South Hylton Primary Academy	£1,257,952.32	£1,353,445.89	-£8,240.01	-£37.29	£1,345,205.88	6.94%
Southwick Community Primary School	£1,864,750.93	£1,914,703.48	-£10,066.98	-£37.29	£1,904,636.49	2.14%

ANALYSIS OF HIGH NEEDS TRANSFER COSTS

APPENDIX B

	2025/26	Pre Transfer	Cost of transfer	Per pupil	Post transfer to HNB	% Cash increase
Springwell Village Primary School	£900,488.48	£951,883.81	-£6,413.04	-£37.29	£945,470.76	5.00%
St Anne's Roman Catholic VA Primary	£1,214,202.04	£1,279,868.22	-£7,867.16	-£37.29	£1,272,001.06	4.76%
St Bede's Catholic Primary School	£1,038,761.45	£1,048,569.81	-£6,897.75	-£37.29	£1,041,672.06	0.28%
St Benet's Roman Catholic VA Primary	£1,435,935.00	£1,378,888.25	-£1,525.54	-£5.71	£1,377,362.71	-4.08%
St Cuthbert's Catholic Primary	£1,116,711.20	£1,213,486.01	-£7,829.88	-£37.29	£1,205,656.13	7.96%
St John Bosco Catholic Primary School	£1,027,669.05	£1,074,146.56	-£6,487.61	-£37.29	£1,067,658.95	3.89%
St John Boste Catholic Primary School	£929,448.65	£951,311.44	£0.00	£0.00	£951,311.44	2.35%
St Joseph's Catholic Primary, S'land	£1,172,112.75	£1,237,906.19	-£7,867.16	-£37.29	£1,230,039.03	4.94%
St Joseph's Catholic Primary, W'ton	£1,062,175.09	£1,095,236.37	-£7,494.31	-£37.29	£1,087,742.06	2.41%
St Leonard's Catholic Primary School	£1,033,431.20	£1,175,600.63	-£7,494.31	-£37.29	£1,168,106.32	13.03%
St Mary's Catholic Primary School	£2,086,055.00	£2,143,185.00	£0.00	£0.00	£2,143,185.00	2.74%
St Michael's Catholic Primary School	£1,030,484.75	£1,056,152.77	-£7,196.03	-£37.29	£1,048,956.74	1.79%
St Patrick's Catholic Primary School	£931,153.46	£1,097,748.27	-£6,860.46	-£37.29	£1,090,887.80	17.15%
St Paul's CofE Primary School	£1,377,108.22	£1,499,230.31	-£10,738.12	-£37.29	£1,488,492.19	8.09%
Thorney Close Primary School	£1,527,933.63	£1,624,165.05	-£9,246.71	-£37.29	£1,614,918.34	5.69%
Town End Academy	£1,152,849.37	£1,188,056.58	-£6,524.90	-£37.29	£1,181,531.69	2.49%
Usworth Colliery Primary School	£2,127,432.50	£2,173,593.50	-£12,415.95	-£37.29	£2,161,177.56	1.59%
Valley Road Academy	£1,928,696.72	£1,913,827.88	-£11,185.54	-£37.29	£1,902,642.34	-1.35%
Wessington Primary School	£1,170,748.87	£1,161,483.43	-£6,674.04	-£37.29	£1,154,809.40	-1.36%
Willow Wood Community Primary	£1,574,770.17	£1,696,780.05	-£9,284.00	-£37.29	£1,687,496.05	7.16%

ANALYSIS OF HIGH NEEDS TRANSFER COSTS

APPENDIX B

	2025/26	Pre Transfer	Cost of transfer	Per pupil	Post transfer to HNB	% Cash increase
Academy 360	£6,594,118.83	£6,750,107.87	-£32,177.06	-£37.29	£6,717,930.80	1.88%
Biddick Academy	£7,756,236.70	£7,602,867.05	-£38,366.39	-£37.29	£7,564,500.66	-2.47%
Castle View Enterprise Academy	£8,032,193.44	£8,203,948.75	-£37,471.55	-£37.29	£8,166,477.20	1.67%
Christ's College	£5,146,671.18	£5,562,831.45	-£29,343.39	-£37.29	£5,533,488.06	7.52%
Farringdon Community Academy	£5,066,127.23	£5,645,101.19	-£26,696.15	-£37.29	£5,618,405.04	10.90%
Hetton Academy	£5,164,534.74	£5,445,844.53	-£25,092.89	-£37.29	£5,420,751.64	4.96%
Kepier	£8,171,459.38	£8,679,732.35	-£42,766.04	-£37.29	£8,636,966.32	5.70%
Monkwearmouth Academy	£5,816,676.66	£6,090,271.94	-£30,461.95	-£37.29	£6,059,810.00	4.18%
Oxclose Community Academy	£7,881,462.66	£7,942,970.66	-£38,440.96	-£37.29	£7,904,529.69	0.29%
Red House Academy	£3,770,904.43	£3,933,448.00	-£16,480.02	-£37.29	£3,916,967.97	3.87%
Sandhill View Academy	£7,199,545.51	£7,438,679.39	-£27,963.84	-£37.29	£7,410,715.55	2.93%
Southmoor Academy	£8,615,980.71	£9,217,780.82	-£45,115.00	-£37.29	£9,172,665.82	6.46%
St Aidan's Catholic Academy	£5,899,873.66	£6,653,827.25	-£34,451.45	-£37.29	£6,619,375.80	12.20%
St Anthony's Girls' Catholic Academy	£7,348,472.04	£7,771,985.95	-£40,528.93	-£37.29	£7,731,457.02	5.21%
St Robert of Newminster Catholic	£8,009,562.40	£8,060,581.24	-£42,579.61	-£37.29	£8,018,001.63	0.11%
Thornhill Academy	£4,582,307.62	£4,619,805.05	-£19,686.55	-£37.29	£4,600,118.51	0.39%
Venerable Bede CofE Academy	£5,973,167.65	£5,632,426.44	-£27,889.27	-£37.29	£5,604,537.17	-6.17%
Washington Academy	£4,848,427.80	£5,429,304.40	-£23,303.20	-£37.29	£5,406,001.20	11.50%
Primary Schools			-£620,868		£117,759,419	
Secondary Schools			-£578,814		£120,102,700	
			-£1,199,683		£237,862,120	

Primary minimum per pupil funding level	Secondary (KS3 only) minimum per pupil	Secondary (KS4 only) minimum per pupil	Secondary minimum per pupil funding level	Disapportionment number where
£5,115.00	£6,388.00	£7,018.00	£6,640.00	

Pupil Led Factors

Basic per-pupil entitlement	Description	Amount per pupil	Pupil Units		Sub Total	Total	Proportion of total pre MFG funding (%)	Notional SEN (%)	
		Primary (Years R-6)	£3,980.32	20,614.00		£82,050,416	£169,722,223	34.22%	2.70%
	Key Stage 3 (Years 7-9)	£5,602.32	8,963.00		£50,213,638	20.94%		1.80%	
	Key Stage 4 (Years 10-11)	£6,326.32	5,921.00		£37,458,169	15.62%		1.70%	

Deprivation	Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
		FSM	£505.00	£505.00	6,586.00	5,603.00	£6,155,445	£36,378,660	15.17%	100.00%
	FSM6	£1,210.00	£1,725.00	6,631.00	5,659.00	£17,785,285	100.00%			100.00%
	IDACI Band F	£240.00	£345.00	1,994.80	1,553.28	£1,014,634	25.00%			25.00%
	IDACI Band E	£290.00	£460.00	2,577.61	1,806.35	£1,578,430	25.00%			25.00%
	IDACI Band D	£455.00	£650.00	1,618.67	1,155.27	£1,487,423	25.00%			25.00%
	IDACI Band C	£500.00	£710.00	2,601.27	1,913.96	£2,659,551	25.00%			25.00%
	IDACI Band B	£530.00	£760.00	3,059.60	2,232.13	£3,318,009	25.00%			25.00%
	IDACI Band A	£700.00	£970.00	1,778.86	1,169.78	£2,379,883	25.00%	25.00%		

English as an Additional	Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
		EAL 3 Primary	£610.00		1,224.65		£747,037	£1,698,861	0.51%	
	EAL 3 Secondary		£1,630.00		293.17	£477,869				

Mobility	Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
		Pupils starting school outside of normal entry dates	£985.00	£1,415.00	321.57	111.10	£473,955		0.20%	

Low prior attainment	Description	Weighting	Amount per pupil (primary or secondary respectively)	Percentage of eligible pupils	Eligible proportion of primary and secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
		Primary low prior attainment		£1,200.00	32.91%	6,784.28	£8,141,133	£13,381,493	5.58%	100.00%
	Secondary low prior attainment (year 7)	60.34%		18.97%						
	Secondary low prior attainment (year 8)	57.71%		18.88%						
	Secondary low prior attainment (year 9)	55.77%	£1,825.00	19.51%	2,871.43	£5,240,360				
	Secondary low prior attainment (year 10)	54.47%		19.53%						
	Secondary low prior attainment (year 11)	54.47%		19.55%						

Other Factors

Factor	Lump Sum per Primary School	Lump Sum per Secondary	Lump Sum per Middle	Lump Sum per All-through	Total (£)	Proportion of total pre MFG	Notional SEN (%)
Lump Sum	£152,700.00	£152,700.00			£15,117,300	6.30%	
Rates					£1,930,880	0.81%	
PFI funding					£1,239,195	0.52%	
Total Funding for Schools Block Formula (excluding minimum per pupil funding level and MFG Funding Total)					£239,468,612	99.87%	

13) Additional funding to meet minimum per pupil funding level	£301,508	0.13%	
Total Funding for Schools Block Formula (excluding MFG Funding Total)	£239,770,120	100.00%	

14) Minimum Funding Guarantee	£22,880		
	Total (£)	Proportion of Total funding(%)	Notional SEN (%)
MFG Net Total Funding (MFG + deduction from	£22,880	0.01%	
Total Funding for Schools Block Formula	£239,793,000		£44,187,701
Notional SEN	Top-up - proportion of NOR	2.25%	SEN support
			18.14%
	Notional SEN funding per eligible pupil		£6,115

Growth fund (if applicable)	£874,840.00		
Total Funding For Schools Block Formula (including growth and falling rolls funding)	£240,667,840		
% Distributed through Basic Entitlement	70.79%		
% Pupil Led Funding	92.25%		
Primary: Secondary Ratio	1 :	1.32	

26-27 NFF NNDR allocation, excluding prior year adjustments	£1,930,880	
Total Funding For Schools Block Formula (including growth and falling rolls funding) after deduction of 26-27 NFF	£238,736,960	

BUDGET CASH CHANGE

APPENDIX D

	£229,305,782	36057	35498	-559	£237,850,345		£7,040,571	£1,515,766
	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Final Allocations 2026/27	Change in funding YoY	Rolled in grants 2627	True increase /decrease exc grants
Albany Village Primary School	£1,157,135.96	194	190	-4	£1,196,780.92	£39,922.04	£41,536.00	-£1,613.96
Barmston Village Primary School	£1,210,594.08	183	185	2	£1,311,524.04	£101,199.75	£43,847.00	£57,352.75
Barnes Infant Academy	£1,302,832.18	240	246	6	£1,391,687.08	£88,854.90	£41,668.00	£47,186.90
Barnes Junior School	£1,927,842.74	360	350	-10	£1,986,616.43	£59,284.12	£63,064.00	-£3,779.88
Barnwell Academy	£1,109,517.62	209	210	1	£1,161,736.05	£52,218.43	£37,376.00	£14,842.43
Benedict Biscop CofE Academy	£1,352,715.00	273	290	17	£1,483,350.00	£130,635.00	£46,404.00	£84,231.00
Bernard Gilpin Primary School	£2,109,339.00	426	417	-9	£2,140,236.28	£31,505.41	£70,983.00	-£39,477.59
Bexhill Academy	£1,758,122.81	294	297	3	£1,868,893.88	£110,771.08	£61,347.00	£49,424.08
Biddick Primary School	£1,324,931.15	260	267	7	£1,455,218.03	£130,676.25	£45,577.00	£85,099.25
Blackfell Primary School	£806,806.13	137	124	-13	£801,188.00	-£5,437.30	£27,302.00	-£32,739.30
Broadway Junior School	£1,384,509.96	238	225	-13	£1,424,477.55	£40,295.72	£48,919.00	-£8,623.28
Burnside Academy Inspires	£900,012.21	144	149	5	£974,349.39	£74,337.18	£32,859.00	£41,478.18
Castletown Primary School	£1,805,529.70	333	312	-21	£1,826,788.56	£21,713.86	£59,250.00	-£37,536.14
Dame Dorothy Primary School	£1,055,503.81	184	159	-25	£1,004,884.19	-£50,619.62	£31,461.00	-£82,080.62
Diamond Hall Infant Academy	£1,538,381.98	255	225	-30	£1,481,775.84	-£56,606.15	£44,207.00	-£100,813.15
Diamond Hall Junior Academy	£1,878,865.80	326	327	1	£2,025,297.09	£146,431.29	£65,461.00	£80,970.29
Dubmire Primary	£1,946,375.88	370	389	19	£2,187,107.07	£240,731.19	£72,963.00	£167,768.19
Easington Lane Primary School	£1,498,419.28	251	226	-25	£1,450,192.97	-£47,896.72	£48,680.00	-£96,576.72
East Herrington Primary Academy	£2,071,190.00	418	416	-2	£2,167,480.23	£96,290.23	£68,246.00	£28,044.23
East Rainton Primary School	£632,232.32	101	94	-7	£625,599.02	-£6,496.21	£20,336.00	-£26,832.21
English Martyrs' Catholic Primary	£1,073,527.76	169	159	-10	£1,066,004.42	-£7,523.34	£32,825.00	-£40,348.34
Eppleton Academy Primary School	£1,087,806.63	188	186	-2	£1,128,066.63	£40,260.00	£36,788.00	£3,472.00
Farringdon Academy	£1,844,396.01	317	347	30	£2,138,264.95	£293,868.94	£71,841.00	£222,027.94
Fatfield Academy	£1,051,118.04	198	207	9	£1,147,312.09	£96,194.05	£36,481.00	£59,713.05
Fulwell Infant School Academy	£1,332,895.00	269	270	1	£1,381,050.00	£48,155.00	£42,876.00	£5,279.00
Fulwell Junior School	£1,733,025.00	350	349	-1	£1,784,626.04	£52,110.00	£55,615.00	-£3,505.00
George Washington Primary School	£2,216,901.48	406	381	-25	£2,228,447.19	£11,545.70	£75,495.00	-£63,949.30
Gillas Lane Primary Academy	£823,893.75	119	117	-2	£854,238.69	£30,344.94	£28,727.00	£1,617.94
Grange Park Primary School	£1,272,771.66	204	179	-25	£1,198,132.50	-£74,378.12	£39,825.00	-£114,203.12
Grangetown Primary School	£1,454,777.10	246	238	-8	£1,525,789.66	£71,359.65	£47,672.00	£23,687.65

BUDGET CASH CHANGE

APPENDIX D

	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Final Allocations 2026/27	Change in funding YoY	Rolled in grants 2627	True increase /decrease exc grants
Grindon Infant School	£823,796.26	128	115	-13	£808,630.76	-£14,997.79	£26,477.00	-£41,474.79
Hasting Hill Academy	£1,177,379.00	178	183	5	£1,278,476.04	£101,097.04	£44,077.00	£57,020.04
Hetton Lyons Primary School	£2,244,786.08	428	423	-5	£2,333,522.33	£88,736.25	£75,129.00	£13,607.25
Hetton Primary School	£1,082,750.00	174	174	0	£1,142,834.80	£60,338.55	£38,416.00	£21,922.55
Highfield Academy	£2,272,639.64	384	377	-7	£2,357,316.37	£84,676.73	£78,187.00	£6,489.73
Hill View Infant Academy	£1,689,655.00	341	340	-1	£1,739,100.00	£49,445.00	£53,798.00	-£4,353.00
Hill View Junior Academy	£2,234,705.00	451	454	3	£2,322,439.49	£87,734.49	£73,920.00	£13,814.49
Holley Park Academy	£983,550.48	191	188	-3	£1,021,123.42	£37,572.94	£32,342.00	£5,230.94
Hudson Road Primary School	£1,794,663.53	305	305	0	£1,955,854.24	£161,635.50	£58,815.00	£102,820.50
Hylton Castle Primary School	£1,234,382.05	205	205	0	£1,330,443.54	£96,360.45	£45,019.00	£51,341.45
John F Kennedy Primary School	£2,043,348.48	383	378	-5	£2,148,619.67	£105,271.20	£67,656.00	£37,615.20
Lambton Primary School	£914,966.02	161	156	-5	£962,116.58	£47,378.06	£31,682.00	£15,696.06
Marlborough Primary School	£908,577.33	125	119	-6	£903,878.58	-£4,525.21	£30,729.00	-£35,254.21
Mill Hill Primary School	£2,109,339.00	426	434	8	£2,232,873.53	£124,167.45	£70,268.00	£53,899.45
New Penshaw Academy	£782,505.51	119	103	-16	£724,940.16	-£57,565.35	£23,641.00	-£81,206.35
New Silksworth Academy Infant	£780,579.43	132	128	-4	£809,387.62	£28,808.20	£26,594.00	£2,214.20
New Silksworth Academy Junior	£1,208,183.08	207	194	-13	£1,201,369.01	-£6,814.07	£41,820.00	-£48,634.07
Newbottle Primary Academy	£1,942,360.00	392	404	12	£2,074,642.20	£132,282.20	£65,906.00	£66,376.20
Northern Saints CofE Academy	£2,669,572.58	455	420	-35	£2,649,699.97	-£19,872.61	£90,850.00	-£110,722.61
Our Lady Queen of Peace Catholic	£1,370,121.88	275	268	-7	£1,400,680.31	£30,558.44	£44,718.00	-£14,159.56
Oxclose Primary Academy	£1,142,065.90	185	182	-3	£1,190,305.75	£48,239.85	£40,844.00	£7,395.85
Plains Farm Academy	£1,048,214.34	164	154	-10	£1,051,024.68	£2,810.34	£33,648.00	-£30,837.66
Redby Academy	£1,258,358.86	248	221	-27	£1,193,888.31	-£64,470.55	£37,723.00	-£102,193.55
Richard Avenue Primary School	£2,244,925.37	412	405	-7	£2,297,375.54	£53,040.80	£70,007.00	-£16,966.20
Rickleton Primary School	£1,841,958.00	372	390	18	£1,994,281.25	£152,892.00	£62,308.00	£90,584.00
Ryhope Infant School Academy	£664,278.78	104	95	-9	£665,356.02	£1,077.24	£21,461.00	-£20,383.76
Ryhope Junior School	£1,026,404.92	168	159	-9	£1,041,602.72	£15,429.67	£36,297.00	-£20,867.33
Seaburn Dene Primary School	£993,158.88	195	191	-4	£1,027,748.74	£34,868.40	£32,493.00	£2,375.40
Shiney Row Primary School	£1,317,993.45	218	220	2	£1,403,021.24	£85,348.63	£47,138.00	£38,210.63
South Hylton Primary Academy	£1,257,952.32	218	221	3	£1,345,205.88	£87,253.56	£44,791.00	£42,462.56
Southwick Community Primary School	£1,864,750.93	282	270	-12	£1,904,242.74	£39,885.57	£62,840.00	-£22,954.43

BUDGET CASH CHANGE

APPENDIX D

	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Final Allocations 2026/27	Change in funding YoY	Rolled in grants 2627	True increase /decrease exc grants
Springwell Village Primary School	£900,488.48	173	172	-1	£945,470.76	£44,982.29	£29,966.00	£15,016.29
St Anne's Roman Catholic VA Primary	£1,214,202.04	212	211	-1	£1,271,693.35	£57,799.02	£41,105.00	£16,694.02
St Bede's Catholic Primary School	£1,038,761.45	198	185	-13	£1,041,672.06	£2,910.61	£32,191.00	-£29,280.39
St Benet's Roman Catholic VA Primary	£1,435,935.00	290	267	-23	£1,376,973.34	-£58,572.29	£42,105.00	-£100,677.29
St Cuthbert's Catholic Primary	£1,116,711.20	206	210	4	£1,205,656.13	£88,944.93	£39,112.00	£49,832.93
St John Bosco Catholic Primary School	£1,027,669.05	178	174	-4	£1,067,658.95	£39,989.90	£33,828.00	£6,161.90
St John Boste Catholic Primary School	£929,448.65	169	167	-2	£951,311.44	£21,862.79	£30,293.00	-£8,430.21
St Joseph's Catholic Primary, S'land	£1,172,112.75	213	211	-2	£1,230,039.03	£57,926.28	£35,897.00	£22,029.28
St Joseph's Catholic Primary, W'ton	£1,062,175.09	208	201	-7	£1,087,742.06	£25,566.97	£34,567.00	-£9,000.03
St Leonard's Catholic Primary School	£1,033,431.20	187	201	14	£1,168,106.32	£134,675.12	£36,179.00	£98,496.12
St Mary's Catholic Primary School	£2,086,055.00	421	419	-2	£2,143,185.00	£57,130.00	£63,933.00	-£6,803.00
St Michael's Catholic Primary School	£1,030,484.75	198	193	-5	£1,048,956.74	£18,472.00	£32,139.00	-£13,667.00
St Patrick's Catholic Primary School	£931,153.46	160	184	24	£1,090,887.80	£159,734.34	£33,422.00	£126,312.34
St Paul's CofE Primary School	£1,377,108.22	278	288	10	£1,488,072.19	£111,383.98	£47,998.00	£63,385.98
Thorney Close Primary School	£1,527,933.63	249	248	-1	£1,614,556.67	£86,984.71	£55,450.00	£31,534.71
Town End Academy	£1,152,849.37	185	175	-10	£1,181,531.69	£28,682.32	£38,549.00	-£9,866.68
Usworth Colliery Primary School	£2,127,432.50	353	333	-20	£2,160,691.93	£33,745.06	£70,227.00	-£36,481.94
Valley Road Academy	£1,928,696.72	318	300	-18	£1,902,642.34	-£26,054.37	£58,274.00	-£84,328.37
Wessington Primary School	£1,170,748.87	195	179	-16	£1,154,548.35	-£15,939.47	£39,453.00	-£55,392.47
Willow Wood Community Primary	£1,574,770.17	242	249	7	£1,687,132.93	£112,725.89	£57,567.00	£55,158.89

BUDGET CASH CHANGE

APPENDIX D

	2025/26	Oct 24 Pupil No's	Oct 25 Pupil No's	Diff	Final Allocations 2026/27
Academy 360	£6,594,118.83	882	863	-19	£6,717,930.80
Biddick Academy	£7,756,236.70	1096	1029	-67	£7,564,500.66
Castle View Enterprise Academy	£8,032,193.44	1037	1005	-32	£8,166,477.20
Christ's College	£5,146,671.18	776	787	11	£5,533,488.06
Farringdon Community Academy	£5,066,127.23	671	716	45	£5,618,405.04
Hetton Academy	£5,164,534.74	674	673	-1	£5,420,751.64
Kepier	£8,171,459.38	1140	1147	7	£8,636,966.32
Monkwearmouth Academy	£5,816,676.66	816	817	1	£6,059,810.00
Oxclose Community Academy	£7,881,462.66	1082	1031	-51	£7,904,529.69
Red House Academy	£3,770,904.43	448	442	-6	£3,916,967.97
Sandhill View Academy	£7,199,545.51	767	750	-17	£7,410,715.55
Southmoor Academy	£8,615,980.71	1204	1210	6	£9,172,665.82
St Aidan's Catholic Academy	£5,899,873.66	859	924	65	£6,619,375.80
St Anthony's Girls' Catholic Academy	£7,348,472.04	1090	1087	-3	£7,731,457.02
St Robert of Newminster Catholic	£8,009,562.40	1198	1142	-56	£8,018,001.63
Thornhill Academy	£4,582,307.62	554	528	-26	£4,600,118.51
Venerable Bede CofE Academy	£5,973,167.65	848	748	-100	£5,604,537.17
Washington Academy	£4,848,427.80	594	625	31	£5,406,001.20

Change in funding YoY	Rolled in grants 2627	True increase /decrease exc grants
£123,811.98	£202,727.00	-£78,915.02
-£191,736.04	£204,296.00	-£396,032.04
£134,283.76	£221,252.00	-£86,968.24
£386,816.88	£153,889.00	£232,927.88
£552,277.81	£155,070.00	£397,207.81
£256,216.90	£147,339.00	£108,877.90
£465,506.93	£239,048.00	£226,458.93
£243,133.34	£161,643.00	£81,490.34
£23,067.04	£215,793.00	-£192,725.96
£146,063.54	£107,907.00	£38,156.54
£211,170.04	£172,522.00	£38,648.04
£556,685.11	£249,268.00	£307,417.11
£719,502.14	£171,967.00	£547,535.14
£382,984.98	£203,413.00	£179,571.98
£8,439.23	£208,058.00	-£199,618.77
£17,810.88	£120,321.00	-£102,510.12
-£368,630.48	£154,852.00	-£523,482.48
£557,573.40	£149,726.00	£407,847.40

REPORT TO SUNDERLAND SCHOOLS FORUM

REPORT OF HEAD OF ACCOUNTING AND FINANCE AND DIRECTOR OF EDUCATION

15 January 2026

Dedicated Schools Grant Update and Projected Outturn 2025/26

1. Purpose of the Report

- 1.1 The purpose of this report is to provide the Schools Forum with a projected outturn position for the Dedicated Schools Grant (DSG) in 2025/26 based on extant activity and funding information.
- 1.2 Section 2 of the report sets out the quantitative issues affecting the DSG and Section 3 covers some of the qualitative aspects.

2. Dedicated Schools Grant Projected Outturn 2025/26

- 2.1 The 2025/26 DSG in-year forecast outturn position is a projected deficit of £8,354,286 as at January 2026. This is an overall decrease to the projected deficit of £771,380 since last reported in September 2025.
- 2.2 As reported previously, the DSG adjusted deficit reserve balance carried forward from 2024/25 is £15,893,554. Therefore, the total overall DSG projected deficit reserve balance as of 31 March 2026 is now anticipated to be £24,247,840. Details of the 2025/26 in-year projected overspend are provided in the table and paragraphs below:

2025/26 DSG Budget (After Recoupment)	Revised DSG Budget as of January 2026 £	Projected Outturn £	Total (Over) / Underspend £
Schools Block	47,709,880	47,060,607	649,273
Central School Services Block	1,547,972	1,483,746	64,226
Early Years Block	40,338,413	40,014,261	324,152
High Needs Block	38,083,347	47,475,284	(9,391,937)
TOTAL DSG	127,679,612	136,033,898	(8,354,286)

Schools Block and Central School Services Block (CSSB)

- 2.3 The Schools' Block is currently projected to be £649,273 underspent at the end of the current financial year. This is an increase of £623,533 to the previously projected underspend, last reported in September 2025, due to the calculation of Growth Fund payments to schools.

- 2.4 The Central School Services Block (CSSB) is projecting an overall underspend of £64,226 which relates to the Historic School Redundancy budget (no change to the position previously reported). It is currently projected this budget will not be spent in 2025/26 as any School/DSG Redundancies will be funded from the Schools Redundancy Reserve or by the schools themselves.

Early Years Block

- 2.5 At this stage, the Early Years block projection is based on the 2025/26 budget position, except for a projected underspend of £104,152 in the Early Years Team due to salary slippage and £220,000 in relation to Disability Access Funding (DAF). Funding for the working parent 2-year-old entitlement along with Under 2s funding is now based on actual termly headcount data rather than January Census, which the other entitlements are funded on. It is anticipated a more accurate projected outturn for Early Years funding will be provided later in the year.

High Needs Block

- 2.6 The volatility, uncertainty, and unknown variables in the High Needs Block (HNB) continue to make budget monitoring and forecasting the outturn position extremely challenging.
- 2.7 As at beginning of January 2026, the projected HNB in-year outturn position for 2025/26 is an overspend of £9,391,937. This is an increase in overspend of £176,305 since last reported in September 2025, which is mainly due to an increase in EHCP top ups.

The overall HNB anticipated overspend is based on known commitments at this stage and is a result of a continued requirement for the increased number of commissioned places, EHCP top-up payments made during the year and additional Non-Maintained Independent Schools (NMIS) places. The outturn position also includes increased demand and spend on Alternative Provision for permanently excluded pupils.

- 2.8 The HNB forecast overspend is analysed in the table below:

High Needs Block	2025/26 Budget	2025/256 Projected Outturn	Variance
	£	£	£
Commissioned Places - Special	2,982,514	3,619,683	(637,169)
Commissioned Places – Alternative Provisions	2,380,000	2,795,233	(415,233)
Commissioned Places - Resource Provisions	621,541	793,676	(172,135)
Pay and Pensions Grant	884,389	852,709	31,680
Top-Ups	20,377,378	24,336,855	(3,959,477)
Top-Ups - Post 16	1,800,000	2,000,000	(200,000)
Virtual School	456,255	456,255	0
Non-Maintained Independent Schools	4,807,126	8,884,138	(4,077,012)
Retained HNB	3,774,144	3,736,735	37,409
Total HNB - Together for Children	38,083,347	47,475,284	(9,391,937)

DSG Reserves

- 2.9 The previously reported DSG deficit reserve balance brought forward as of 31 March 2025 is £15,893,554. The projected in-year outturn position for 2025/26 is £8,354,286 overspend, therefore the overall projected deficit on the DSG Reserve as of 31 March 2026 is estimated to be £24,247,840.
- 2.10 Appendix A provides a summary position of the 2025/26 budget and projected outturn.

3. High Needs Block Pressures 2025/26 and Ongoing

- Increase in number of Needs Assessments and EHCP plans issued.
- Increase in complexity of need in respect of Autism and SEMH.
- Total number of EHCPs:
September 2022 - 2,393
September 2023 - 2,713
September 2024 - 2,967
September 2025 - 3,089
January 2026 – 3,210
- Commissioned places: as reported to Schools Forum in October 2024, there was an overall increase of 87 places from 1,995 in September 2024 to 2,082 in September 2025 required in special schools and Resourced Provisions. As reported to Schools Forum in November 2025, there is an increase of 52 places from September 2026 taking total places to 2,236.
- NMIS: increased charges for inflation.
- Post 16: Increase in number of Commissioned places and top-ups.
- Current projected spend for 2025/26 EHCP top-up fees are based on the current EHCP numbers/spend as of January 2026 plus an estimated 3% increase to project further costs for increase in EHCP numbers by 31 March 2026. NOTE Schools Forum agreed 0.9% increase in Top-up Bandings from April 2025, this additional cost is included in projected spend.
- ICB have confirmed they will no longer be contributing to EHCP Health costs from 1 April 2026. The total income to be received in 2025/26 from ICB is anticipated to be £644,132, which will be an added recurrent pressure on the High Needs Block budget from 2026/27.
- Retained staff proposed pay awards. A 3.2% pay award was agreed for Non-Teaching staff from April 2025, this additional cost is built into the projected outturn along with 5% pay award for Teaching staff from 1 September 2025. Soulbury staff pay awards from September 2025 are still to be agreed, an assumed increase of 5% has now been built into 2025/26 High Needs Outturn.
- Increase in number of Permanent Exclusions and requirement to commission Alternative Provision places.

3.2 **SEND DBV Mitigations**

- Opening 2 new Mainstream 16 place (32 places in total) School Resourced provisions from September 2025 at Redby Academy and Hetton Lyons Academy.
- Opening 2 new Mainstream 16 Places (32 places in total) School Resourced provisions from September 2026 at Valley Road Primary and Gillas Lane Primary.
- Expansion of Sunningdale School into an additional site at Ryhope for an additional 24 places.
- TfC are working with The Link School to convert their conference facility into suitable day 6 provision for up to 32 pupils. This will follow the assessment hub model and is expected to open September 2026.
- Increase in number of Commissioned places by 14 in Academy Special Schools from September 2025 and by an additional 4 from September 2026.
- Supporting the goals and aspirations of the child in a Mainstream setting rather than Special Schools and Non-Maintained Independent Schools, with a clear understanding of the SEN offer for all schools via the Ordinarily Available Offer due to be launched January 2026, which will provide a strong evidence base for costing EHCP top ups.
- Supporting the goals and aspirations of the child can be achieved without the need for an EHCP in Post-16 provision, ceasing Post-19 EHCPs at the right point in a young person's educational journey.

4. **Recommendations**

4.1 The Schools Forum is invited to:

- i. Note the contents of the report.
- ii. Seek updates on the 2025/26 projected outturn position at the March 2026 School Forum meeting.

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2025/26 DSG Funding as at January 2026

APPENDIX A

SUMMARY

	Schools Block	Central School Services Block	High Needs Block	Early Years Block	Total 2025/26 BUDGET
	£		£	£	£
Funding Settlement 2025/26 (includes Pay & Pensions)	233,241,634	1,547,972	49,604,211	40,023,608	324,417,425
Rates Deduction	(1,999,210)		0		(1,999,210)
Central Teachers & AP provision Pay/Pension Grant			181,759		181,759
Additional HNB Funding			0		0
Less import/Export adj for High Needs block			(450,000)		(450,000)
Free Special Schools funding			0	0	0
Total DSG (Before High Need Deductions)	231,242,424	1,547,972	49,335,970	40,023,608	322,149,974
Less Academy Recoupment high Needs places			(12,408,835)		(12,408,835)
Early Years Adjustment 25-26				314,805	314,805
	231,242,424	1,547,972	36,927,135	40,338,413	310,055,944
Transfer from Schools Block to High Needs block	(1,156,212)		1,156,212		0
Total Adjusted DSG (Before Academy Recoupment)	230,086,212	1,547,972	38,083,347	40,338,413	310,055,944
Academy Recoupment Schools	(182,376,332)				(182,376,332)
Total DSG Academy recoupment	47,709,880	1,547,972	38,083,347	40,338,413	127,679,612
ESFA Totals before 0.5% Transfer	48,866,092	1,547,972	36,927,135	40,338,413	127,679,612

DETAIL

	2025/26 Schools block Allocation	2025/26 CSSB Allocation	2025/26 HNB Allocation	2025/26 EYB Allocation	2025/26 DSG TOTAL Allocation	2025/26 Projected Spend	2025/26 Projected (Over)/ Underspend
Local Authority							
Maintained Schools Budgets - Primary	46,903,711				46,903,711	46,903,711	0
Maintained Schools Budgets - Secondary					0	0	0
De delegation Union Facility	29,599				29,599	29,599	0
Academy Recoupment Rates Saving	25,740				25,740	0	25,740
ESG Transfer into DSG - Retained functions		583,000			583,000	583,000	0
Admissions Team		15,000			15,000	15,000	0
Termination Of Employment Costs		64,226			64,226	0	64,226
Growth Fund	750,830				750,830	127,297	623,533
Copyright Licencing		278,498			278,498	278,498	0
Total DSG - Local Authority Funding	47,709,880	940,724	0	0	48,650,604	47,937,105	713,499
Together for Children							
CSSB Retained including Schools Forum & NMIS Fees No EHCP		392,672			392,672	408,014	(15,342)
SACRE		13,000			13,000	13,000	0
Teachers Pensions Grant-Retained Teachers		48,576			48,576	48,576	0
Admissions Team		153,000			153,000	137,658	15,342
Commissioned Places - Special Schools			2,982,514		2,982,514	3,619,683	(637,169)
Commissioned Places - Link School & Alternative Provisions			2,380,000		2,380,000	2,795,233	(415,233)
Commissioned Places - Resource Provisions			621,541		621,541	793,676	(172,135)
Teachers Pay & Pensions Grant £660 per place			884,389		884,389	852,709	31,680
Top Ups			20,377,378		20,377,378	24,336,855	(3,959,477)
Top Ups - Post 16			1,800,000		1,800,000	2,000,000	(200,000)
Virtual School			456,255		456,255	456,255	0
Residential - Non Maintained Independent			4,807,126		4,807,126	8,884,138	(4,077,012)
Retained HNB			3,774,144		3,774,144	3,736,735	37,409
3&4 Year old				11,453,542	11,453,542	11,453,542	0
Additional hours 3 & 4 year olds				5,301,028	5,301,028	5,301,028	0
Pupil Premium 2, 3 & 4 year olds				858,068	858,068	858,068	0
Additional Nursery funding				1,522,978	1,522,978	1,522,978	0
Retained by LA 5%				800,000	800,000	695,848	104,152
2 year olds				2,779,508	2,779,508	2,779,508	0
2 Year old working parents entitlement NEW 24/25				6,772,783	6,772,783	6,772,783	0
Under 2 Entitlement NEW 24/25				9,936,880	9,936,880	9,936,880	0
SEN inclusion				560,000	560,000	560,000	0
Disability allow				353,626	353,626	133,626	220,000
Total DSG Together for Children funding	0	607,248	38,083,347	40,338,413	79,029,008	88,096,793	(9,067,785)
Total Adjusted DSG	47,709,880	1,547,972	38,083,347	40,338,413	127,679,612	136,033,898	(8,354,286)
						DSG Deficit Reserve Balance 31/3/25	(16,048,724)
						Early Years 2024/25 Pupil No Adj to Reserve Balance	155,170
						Projected DSG Deficit Reserve Balance 31/3/26	(24,247,840)