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<b>Report To:</b>	<b>Education and Communities Committee</b>	<b>Date:</b>	<b>30 October 2018</b>
<b>Report By:</b>	<b>Corporate Director Education, Communities &amp; Organisational Development</b>	<b>Report No:</b>	<b>EDUCOM/91/18/RB</b>
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<b>Subject:</b>	<b>Update on the use of the Pupil Equity Fund</b>		

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## 1.0 PURPOSE

- 1.1 The purpose of this report is to update the Committee as to how schools are using Pupil Equity Funding (PEF).

## 2.0 SUMMARY

- 2.1 The PEF has been paid by the Scottish Government to local authorities by means of a ring-fenced grant with indicated amounts that should be allocated directly to each school. The amount allocated to each school has been decided according to the number of pupils in P1-S3 who are eligible to be registered for free school meals. The funding for 2017/18 was announced in January 2017 and the funding for 18/19 was announced in February 2018
- 2.2 Schools submit annual plans to the authority officers outlining how they intend to use their PEF. The plans are supported by national and local guidance. All schools are expected to link their PEF plans to their annual improvement planning process through the ongoing Standards and Quality and Improvement Plan. In addition, and as part of the ongoing monitoring process, in June 2018 schools reported on the impact of the previous year's funding. Opportunities exist for schools to share their plans for the forthcoming year.
- 2.3 Whilst schools submit indicative plans that have been agreed with the school community, this may be subject to change. Head Teachers have received support and guidance in matters of finance, procurement, ICT, Human Resources and educational research. Trade unions have worked with officers to agree protocols for recruitment to ensure a consistent approach across Inverclyde. Local guidance has been issued to Head Teachers which outlines the governance arrangements that are in place.
- 2.4 Schools have taken forward a wide variety of interventions. Opportunities to share practice and to identify what is working well are offered both locally and through Education Scotland. Schools have ensured PEF plans align closely with Scottish Attainment Challenge aims, contributing to a wider whole authority overview of how we are reducing the attainment gap.
- 2.5 All Head Teachers are able to identify and articulate attainment gaps for their respective establishments. Head Teachers implemented strategies and interventions to targeted cohorts of young people who were at risk of not making the expected progress.
- 2.6 Almost all Head Teachers, while recognising that the PEF programme is still at an early stage, were able to report improvement in targeted areas.

### **3.0 RECOMMENDATIONS**

3.1 The Committee is asked to note the contents of this report.

**Ruth Binks**  
**Corporate Director**  
**Education, Communities & Organisational Development**

## 4.0 BACKGROUND

- 4.1 The First Minister launched the Scottish Attainment Challenge in February 2015 to narrow the poverty-related attainment gap in the primary sector within seven Challenge Authorities. This was extended in June 2016 to include secondary schools; the Inverclyde Attainment Challenge work now covers the whole of the Broad General Education.
- 4.2 As part of the Scottish Government Attainment Challenge fund, the Scottish Government has committed a further £120 million allocated directly to schools to reduce the attainment gap linked to deprivation. In 2017/18, for each child in a publicly funded primary or secondary school who is eligible and registered for free school meals, the school will receive £1,200. This is known as Pupil Equity Funding (PEF). The Pupil Equity Funding forms part of the Scottish Attainment funding, to be administered over the course of the current Parliament.
- 4.3 Each school was notified of their second allocation of PEF funding in February 2018 (Appendix 1).
- 4.4 Schools were asked to submit plans for PEF in April 2018. The Scottish Government and Education Scotland remain very clear that PEF should not provide extra bureaucracy for school leaders, therefore the plans for, and evaluations of, PEF should be part of the school's improvement planning cycle through the annual Standards and Quality Report and Improvement Plan. Inverclyde Education Services have now adapted the pro-forma for both documents to take PEF into account.
- 4.5 The authority Quality Improvement Team working alongside Head Teachers has ensured that any proposed use of PEF links with the aims of the Scottish Attainment Challenge. All schools benefit from the data sets that have been used in the Attainment Challenge to help to track and monitor the progress of individual pupils and to evaluate the impact of the funding. Heads of Establishment meetings give schools the opportunities to discuss interventions and share good practice.
- 4.6 The key principles of the PEF continue to be:
  - Head Teachers must have access to the full amount of the allocated PEF.
  - The PEF must enable schools to deliver activities, interventions or resources which are clearly additional to those which are already planned.
  - Head Teachers must work in partnership with each other, and their local authority, to agree the use of funding. Schools must take account of the statutory responsibilities of the authority to deliver educational improvement, secure best value, and the authority's role as employer.
  - Parents and carers, children and young people and other key stakeholders should be involved in the planning process.
  - Funding must be provided for targeted support for children and young people affected by poverty to achieve their full potential. Although the PEF is allocated on the basis of free school meal eligibility, Head Teachers can use their professional judgement to bring additional children into targeted interventions.
  - Head Teachers must base their use of the funding on a clear contextual analysis which identifies the poverty related attainment gap in their schools and plans must be grounded in evidence of what is known to be effective at raising attainment for children affected by poverty.
  - Schools must have plans in place at the outset to evaluate the impact of the funding.
- 4.7 Unsurprisingly, plans have remained flexible and have changed throughout the year. This has been in the main because of the difficulty in recruiting extra staff but also because schools have had opportunities to learn from each other and to share practice as to what is working.

## 5.0 CURRENT POSITION

5.1 Timetable for PEF Implementation was as follows:

- (i) Schools' PEF 2017/18 progress report was submitted to the authority in April 2018. These reports outlined progress and successes with previous PEF plans.
- (ii) PEF plans for session 2018/19 were submitted to authority in April 2018. The plans clearly show arrangements that schools have in place to evaluate projects.
- (iii) PEF plans were discussed and evaluated against aims of Scottish Attainment Challenge and the Scottish Educational Endowment Toolkit.
- (iv) Quality Improvement Officers provided additional support and feedback to schools. Plans implemented in establishments from May 2018.

Appendix 2 shows a summary of Pupil Equity Spending proposals by Equity Intervention

5.2 In 2017/18 Inverclyde schools were awarded £2,450,400 in Pupil Equity Funding. By the end of the financial year March 2018 there was an underspend of £1,235,191; in line with Scottish Government guidance this was carried forward into the following financial year. By June 2018 the further spends and committed budget had reduced the underspend to £388,045. In the main this was due to projects that could only take place during the summer holidays e.g. installation of Wi-Fi, delays for orders or because of continued backfill issues with staffing.

5.3 The main reason for the under spends continues to be the issues associated with recruitment and back filling. Backfill for posts continues to be problematic with almost all teachers initially employed for PEF having to backfill core vacancies. All too often teachers appointed to support pupils have to be taken off timetable to cover for absences elsewhere. With very little supply in the system, at least there are teachers available through PEF to cover classes but it could be argued that the employment of the additional PEF teachers is contributing to the lack of available supply.

5.4 Schools employed 38.8 fte additional teaching staff to take forward literacy, numeracy or health and wellbeing initiatives; in particular to target interventions and recovery style programmes for those pupils who were not making the expected progress.

5.5 Schools remunerated an additional 27 members of staff for taking on additional responsibility and leadership opportunities to take forward and lead initiatives within the school. This included the monitoring and tracking of progress for pupils, ensuring that pupils received the support they needed and undertaking evaluations to ensure that interventions are effective.

5.6 49.39 fte additional extra support staff: these include CLD workers, Health and Wellbeing Coaches, extra ASN support staff, additional admin support were employed to help with the tracking and monitoring process and EYECOs.

5.7 A number of schools have presented their progress at National Events and Regional Improvement collaborative events. These have been well received by all participants.

5.8 Schools continue to enhance the classroom practice of teachers through the provision of high quality professional development. The work of Inverclyde's Attainment Challenge is heavily influenced by the work of John Hattie and the Inverclyde Learning, Teaching and Assessment Policy which is based on his research. Hattie has conducted research to identify the effect sizes of different interventions. His programme; Visible Learning allows teachers to build upon their practice in their classroom to ensure that they get maximum impact for all of their learners. Almost all primary schools have chosen to undertake training in Visible Learning for all classroom practitioners and this is being considered by some secondary schools. One secondary school has piloted using a company who take forward pedagogy (effective teaching practice) through a coaching and mentoring approach. A further three secondary schools are introducing this approach in session 2018/19

5.9 Nurture approaches continue to be a strong feature of establishments' targeted support.

One secondary school has introduced an Attainment Centre and other secondary schools have introduced nurture facilities to help support those who have become increasingly disengaged in their learning. Schools continue to work with Community Learning and Wellbeing Officers to build on and improve parental engagement.

5.10 Extra targeted supported study sessions are taking place, including the introduction of breakfast clubs in secondary schools.

5.11 Increased ICT

- Establishments working with IT colleagues, as indicated in the previous PEF report, completed the necessary survey to increase Wi-Fi capability in schools so that pupils could make the best use of any ICT. Subsequently a number of schools have taken up the option to improve WI-FI capability and purchase additional ICT equipment.

5.12 Counselling Services

- In order to support the mental health of pupils, some schools have opted for counselling and therapeutic play services.

### Current Challenges

5.13 Backfill for posts continues to be problematic with almost all teachers initially employed for PEF having to backfill core vacancies. The implementation of additional posts is closely monitored to ensure equity and fairness in the system. We are fortunate that schools operate in a collegiate way and support each other to ensure that core vacancies are filled but this does mean that plans cannot be taken forward as anticipated and schools have an underspend.

5.14 Working closely with our finance officers, procurement thresholds are closely monitored. However as schools share successes of different interventions and programmes then spend against procurement thresholds become increasingly difficult to monitor. For example, a school may buy in an intervention or programme that is subsequently taken up by other schools. The initial school would not meet the procurement threshold but as the spend gets bigger then this impacts on the overall authority spend.

5.15 All PEF posts created are temporary. It should be noted that if schools chose to spend money on additional staff, it does not contribute to the authority pupil teacher ratio.

Year upon year funding sources and uncertainty around the future funding models mean that temporary posts have to be created. There is a risk that in the longer term, post holders are entitled to a conservation of salary and there will be no funding in place to support this.

### Evaluation of impact of interventions

5.16 The first evaluation of the impact of interventions through PEF on an individual school basis was reported through the school's Standards and Quality Report in June 2018 and their proposals submitted in April 2018.

5.17 All Head Teachers are able to identify and articulate attainment gaps for their respective establishments. Head Teachers implemented strategies and interventions to targeted cohorts of young people who were at risk of not making the expected progress.

Almost all Head Teachers, while recognising that the PEF programme is still at an early stage, were able to report improvement in targeted areas.

## 6.0 IMPLICATIONS

### Finance

#### 6.1 Financial Implications:

##### One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
Schools	Various	18/19	3,664	N/A	This includes the £1,235k carry forward from 17/18 and the £2,429 allocation for 18/19.  The Scottish Government will allow schools to carry forward this money.

##### Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact £000	Virement From (If Applicable)	Other Comments
N/A					

### Legal

- 6.2 Schools must consider any legal implications when entering into partnership working and follow statutory guidance for procurement.

### Human Resources

- 6.3 There are substantial human resources implications for this policy, including recruitment, job sizing and ensuring that the authority is not liable for any permanent contracts beyond the duration of the funding.

### Equalities

- 6.4 Has an Equality Impact Assessment been carried out?

Yes See attached appendix

No This report does not introduce a new policy, function or strategy or recommend a change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required.

### Repopulation

- 6.5 N/A.

## 7.0 CONSULTATIONS

- 7.1 Ongoing consultations are taking place with Head Teachers and Trade Unions.

## **8.0 CONCLUSIONS**

8.1 The targeted PEF continues to be welcomed by Inverclyde and schools will review the impact and next steps in their forthcoming standards and quality and improvement plans.

## **9.0 BACKGROUND PAPERS**

9.1 Update on the use of the Pupil Equity Funding March 2017.  
Update on the use of the Pupil Equity Fund September 2017.

## Appendix 1

### Allocation of funding to schools for 18/19

		Total amount
Aileymill Primary School	Primary	£184,800
All Saints Primary School	Primary	£202,800
Ardgowan Primary School	Primary	£87,600
Gourock Primary School	Primary	£33,600
Inverkip Primary School	Primary	£9,600
Kilmacolm Primary School	Primary	£18,000
King's Oak Primary School	Primary	£196,800
Lady Alice Primary School	Primary	£90,000
Moorfoot Primary School	Primary	£28,800
Newark Primary School	Primary	£168,000
St Andrew's Primary School	Primary	£109,200
St Francis' Primary School	Primary	£120,000
St John's Primary School	Primary	£70,800
St Joseph's Primary School	Primary	£88,800
St Mary's Primary School	Primary	£80,400
St Michael's Primary School	Primary	£105,600
St Ninian's Primary School	Primary	£40,800
St Patrick's Primary School	Primary	£68,400
Wemyss Bay Primary School	Primary	£18,000
Whinhill Primary School	Primary	£96,000
Clydeview Academy	Secondary	£43,200
Inverclyde Academy	Secondary	£142,800
Notre Dame High School	Secondary	£123,600
Port Glasgow High School	Secondary	£88,800
St Columba's High School	Secondary	£85,200
St Stephen's High School	Secondary	£87,600
Craigmarloch School	Special	£61,200
Lomond View Academy	Special	£ -
		£2,450,400



## Appendix 2

### Summary of Pupil Equity Spending proposals by Equity Intervention

<b>1. Early Interventions</b>	<b>2.Social &amp; Emotional Well Being</b>	<b>3. Health &amp; Well Being</b>
Eyecos Classroom Assistants Early Years Learning Assistants Active Play Programmes Language Assistants Staff Additional Responsibilities	Counselling Programmes Bespoke Counselling Play Therapists Welfare Officers	Health & Well-being coaches Nurture Groups Breakfast Clubs Outdoor Learning Play Coaches Counselling Programmes
<b>4. Targeted Support Literacy Numeracy</b>	<b>5 Professional Development</b>	<b>6. Wider Engagement</b>
Staff Development Accelerated Reading Numeracy Recovery SEAL Targeting Phonics Development Reading Programmes Additional Staff Targeted Support Differentiated Support Classroom Assistants Staff Additional Responsibilities	High Quality Learning and Teaching Developing Pedagogy Coaching Support Visible Learning Literacy training PEF PT's Differentiated Support	Family Learning Officers Extra-Curricular Sports Clubs Family Library Outdoor Play Areas Family Support Residential Seminars Enhanced Supported study STEM Week ends
<b>7. Partnership Working</b>	<b>8. Resources</b>	
Counselling Services Cluster Welfare Officers CLD Support Coaching Support Outreach Workers Children's Advocacy Officer Residential	Administrative Assistants Digital IT Wi-Fi	