

PLEASE NOTE TIMES OF MEETING

A meeting of the Education & Communities Committee will be held on Tuesday 8 March 2022.

The Communities business will commence at 1pm and the Education business at 4pm.

Members may attend the meeting in person or via remote online access. Webex joining details will be sent to Members and Officers prior to the meeting. Members are requested to notify Committee Services by 12 noon on Monday 7 March 2022 how they intend to access the meeting.

In the event of connectivity issues, Members are asked to use the *join by phone* number in the Webex invitation and as noted above.

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IAIN STRACHAN
Head of Legal and Democratic Services

BUSINESS

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The reports are available publicly on the Council's website and the minute of the meeting will be submitted to the next standing meeting of the Inverclyde Council. The agenda for the meeting of the Inverclyde Council will be available publicly on the Council's website.

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Enquiries to – **Diane Sweeney** – Tel 01475 712147

Report To: Education & Communities
Committee

Date: 8 March 2022

Report By: Interim Director of Finance &
Corporate Governance and
Corporate Director Education,
Communities & Organisational
Development

Report No: FIN/12/22/AP/IC

Contact Officer: Iain Cameron

Contact No: 01475 712832

Subject: Communities Revenue & Capital Budget Report
2021/22 - Projected Out Turn at Period 9 to 31 December 2021

1.0 PURPOSE

- 1.1 To advise Committee of the 2021/22 Communities revenue and capital budgets position at Period 9 to 31 December 2021.

2.0 SUMMARY

- 2.1 The total Communities revenue budget for 2021/22, excluding earmarked reserves, is currently £4,435,580. The latest projection is an under spend of £92,000, a decrease in expenditure of £24,000 since last Committee.
- 2.2 The main variances to highlight for the 2021/22 Revenue Budget are –

Libraries & Museum: Projected Overspend £51,000

Libraries & Museum Income is projected to under recover by £58,000. This is due to reduced income from internet access, overdue books fines and goods for resale. Non Domestic Rates (NDR) are projected to overspend by £6,000. The under recovery and overspend is partially offset by a £10,000 projected under spend for utilities and a £3,000 projected under spend for Museum shop Goods for Resale.

Sports & Leisure: Projected Underspend £41,000

The latest projection for Under 16s Free Swimming is an underspend of £57,000, a further reduction in spend of £12,000 since last Committee. The budget for maintaining crawl holes at various 3G pitches is projected to underspend by £13,000, a reduction in spend of £6,000 since last Committee

Community Safety: Projected Underspend £44,000

Community Safety Employee Costs are projected to underspend by £47,000 due to a number of vacancies within Community Safety and School Crossing Patrollers.

Community Halls: Projected Underspend £58,000

Community Halls Employee Costs are projected to underspend by £3,000, an increase in expenditure of £16,000 since last Committee. A number of vacant Letting Officer posts have now been filled. In addition there is a projected underspend of £14,000 for Community Hubs Resources, as previously reported, and a projected over recovery of School Lets Income of £41,000, an increase of £31,000 since last Committee.

- 2.3 The Communities 2021/24 Capital Budget is £4.486 million with £662,000 projected to be spent in the current Financial Year. There is slippage of £675,000 (50%) from the original budget, largely due to delays with the new Indoor Tennis Facility project and the replacement of the moveable pool floor at the Waterfront Leisure Complex. Expenditure to 31 January 2022 was £466,000 or 69% of the projected expenditure for the year. The costs of the overall Capital Programme are being contained within existing budgets. Appendix 4 gives more financial information by project with updates on physical progress of projects provided elsewhere on this agenda.
- 2.4 Earmarked Reserves, excluding those for Asset Plans and Strategic Funds total £92,000 all of which is projected to be spent in the current Financial Year. To date there has been £27,000 (29.3%) of expenditure. Spend to date per profiling was expected to be £12,000 and there is no slippage to report at this time. Appendix 5 provides more information by project.

3.0 RECOMMENDATIONS

- 3.1 The Committee note the current projected under spend of £92,000 for the 2021/22 Communities Revenue Budget as at Period 9 to 31 December 2021.
- 3.2 The Committee note the financial position of the specific capital projects detailed in Appendix 4 and note that the cost of the current Communities Capital Programme is being contained within existing budgets.

Alan Puckrin
Interim Director of Finance
& Corporate Governance

Ruth Binks
Corporate Director Education, Communities &
Organisational Development

4.0 BACKGROUND

- 4.1 The purpose of this report is to advise Committee of the current position of the 2021/22 Revenue and Capital Budgets as at Period 9 to 31 December 2021 and to highlight the main variances contributing to the projected under spend of £92,000 for the 2021/22 Revenue Budget.

5.0 2021/22 REVENUE BUDGET PROJECTED OUT TURN

- 5.1 The current Communities Revenue Budget for 2021/22 is £4,435,580 which is a decrease of £53,380 from the Approved Budget. Appendix 1 provides more details of the budget by Service area. The latest projection is an under spend of £92,000, a net reduction in spend of £24,000 from Period 7.

5.2 Libraries & Museum: Projected Overspend £51,000

Libraries & Museum Income is projected to under recover by £58,000. This is due to reduced income from internet access, overdue books fines and goods for resale.

Non Domestic Rates (NDR) are projected to overspend by £6,000.

The under recovery and overspend is partially offset by a £10,000 projected under spend for utilities and a £3,000 projected under spend for Museum shop Goods for Resale.

Sports & Leisure: Projected Underspend £41,000

The latest projection for Under 16s Free Swimming is an underspend of £57,000, a further reduction in spend of £12,000 since last Committee. The budget for maintaining crawl holes at various 3G pitches is projected to underspend by £13,000, a reduction in spend of £6,000 since last Committee. Also included is a one-off payment of £25,000 to Rankin Park Bowling Club which will be made as part of an amended lease agreed with the club. There is also a minor variance for a shortfall in Rental Income.

Community Safety: Projected Underspend £44,000

Community Safety Employee Costs are projected to underspend by £47,000 due to a number of vacancies within Community Safety and School Crossing Patrollers.

Community Halls: Projected Underspend £58,000

Community Halls Employee Costs are projected to underspend by £3,000, an increase in expenditure of £16,000 since last Committee. A number of vacant Letting Officer posts have now been filled. In addition there is a projected underspend of £14,000 for Community Hubs Resources, as previously reported, and a projected over recovery of School Lets Income of £41,000, an increase of £31,000 since last Committee.

6.0 2021/24 CAPITAL BUDGET PROJECTION

- 6.1 The Communities 2021/24 Capital Budget is £4.486 million with £662,000 projected to be spent in the current Financial Year. There is slippage of £675,000 (50%) from the original budget, largely due to delays with the new Indoor Tennis Facility project and the replacement of the moveable pool floor at the Waterfront Leisure Complex. Expenditure to 31 January 2022 was £466,000 or 69% of the projected expenditure for the year. The costs of the overall Capital Programme are being contained within existing budgets. Appendix 4 gives more financial information by project with updates on physical progress of projects provided elsewhere on this agenda.

7.0 EARMARKED RESERVES

7.1 Earmarked Reserves, excluding those for Asset Plans and Strategic Funds total £92,000 all of which is projected to be spent in the current Financial Year. To date there has been £27,000 (29.3%) of expenditure. Spend to date per profiling was expected to be £12,000 and there is no slippage to report at this time. Appendix 5 provides more information by project.

8.0 VIREMENTS

8.1 There are no virements this Committee cycle.

9.0 IMPLICATIONS

9.1 Finance

All financial implications are discussed in detail within the report above.

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

Annually Recurring Costs / (Savings)

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

9.2 Legal

There are no specific legal implications arising from this report.

9.3 Human Resources

There are no specific human resources implications arising from this report.

9.4 Equalities

Equalities

(a) Has an Equality Impact Assessment been carried out?

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

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
X	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

	YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.
X	NO

9.5 **Repopulation**

There are no repopulation issues with this report.

10.0 CONSULTATION

10.1 The paper has been jointly prepared by the Interim Director of Finance & Corporate Governance and the Corporate Director Education, Communities & Organisational Development.

11.0 BACKGROUND PAPERS

11.1 There are no background papers for this report.

Communities Budget Movement - 2021/22**Period 9 - 1st April 2021 to 31 December 2021**

Service	Approved Budget	Movements			Transferred to EMR £000	Revised Budget 2021/22 £000
	2021/22 £000	Inflation £000	Virement £000	Supplementary Budgets £000		
Libraries & Museum	1,636		1			1,637
Sport & Leisure	1,081		(145)			936
Community Safety	551		(50)			501
Community Halls	969		(25)			944
Grants to Voluntary Organisations	252		166			418
Totals	4,489	0	(53)	0	0	4,436

Movement Details**External Resources****Inflation**

£000	0
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Virement

Cleaning	1
Comm Safety Funding HR Posts	(38)
Sports & Leisure to ED Swimming Lessons	(16)

(53)

Supplementary Budget

0

(53)

COMMUNITIES**REVENUE BUDGET MONITORING REPORT****CURRENT POSITION****Period 9 - 1st April 2021 to 31st December 2021**

2020/21 Actual £000	Subjective Heading	Approved Budget 2021/22 £000	Revised Budget 2021/22 £000	Projected Out-turn 2021/22 £000	Projected Over/(Under) Spend £000	Percentage Over/(Under)
1,754	Employee Costs	1,852	1,827	1,777	(50)	(2.7%)
602	Property Costs	623	624	620	(4)	(0.6%)
2,613	Supplies & Services	1,052	1,045	1,042	(3)	(0.3%)
1	Transport Costs	3	3	3	0	-
72	Administration Costs	75	75	75	0	-
1,173	Other Expenditure	1,254	2,355	2,299	(56)	(2.4%)
(477)	Income	(370)	(1,493)	(1,472)	21	(1.4%)
5,738	TOTAL NET EXPENDITURE	4,489	4,436	4,344	(92)	(2.1%)
0	Earmarked Reserves	0	0	0	0	
(1,378)	Additional Funding Covid-19			0	0	
4,360	TOTAL NET EXPENDITURE excluding Earmarked Reserves	4,489	4,436	4,344	(92)	

2020/21 Actual £000	Objective Heading	Approved Budget 2021/22 £000	Revised Budget 2021/22 £000	Projected Out-turn 2021/22 £000	Projected Over/(Under) Spend £000	Percentage Over/(Under)
1,595	Libraries & Museum	1,637	1,637	1,688	51	3.1%
2,525	Sports & Leisure	1,081	932	891	(41)	(4.4%)
450	Community Safety	550	500	456	(44)	(8.8%)
941	Community Halls	969	949	891	(58)	(6.1%)
227	Grants to Vol Orgs	252	418	418	0	-
5,738	TOTAL COMMUNITIES	4,489	4,436	4,344	(92)	(2.1%)
0	Earmarked Reserves	0	0	0	0	
(1,378)	Additional Funding Covid-19			0	0	
4,360	TOTAL NET EXPENDITURE excluding Earmarked Reserves	4,489	4,436	4,344	(92)	

COMMUNITIES**REVENUE BUDGET MONITORING REPORT****MATERIAL VARIANCES****Period 9 -1st April 2021 to 31st December 2021**

<u>Out Turn</u> <u>2020/21</u> <u>£000</u>	<u>Budget</u> <u>Heading</u>	<u>Budget</u> <u>2021/22</u> <u>£000</u>	<u>Proportion</u> <u>of Budget</u>	<u>Actual to</u> <u>31-Dec-21</u> <u>£000</u>	<u>Projection</u> <u>2020/21</u> <u>£000</u>	<u>(Under)/Over</u> <u>Budget</u> <u>£000</u>	<u>Percentage</u> <u>Over / (Under)</u>
0	Libraries & Museum Income	(76)	(57)	(17)	(18)	58	(76.3%)
180	Sports & Leisure Free Swimming	164	123	70	107	(57)	(34.8%)
0	Rankin Park Payment	0	0	0	25	25	
404	Community Safety Employee Costs	453	326	272	406	(47)	(10.4%)
(135)	Community Halls School Lets Income	(139)	(104)	(116)	(180)	(41)	29.5%
Total Material Variances		402	288	209	340	(21)	

COMMUNITIES COMMITTEE**CAPITAL BUDGET MONITORING REPORT****CURRENT POSITION****Period 9 - 1st April 2021 to 31st December 2021**

Project Name	1	2	3	4	5	6	7	8
	Est Total Cost	Actual to 31/3/21	Approved Budget 2021/22	Revised Est 2021/22	Actual to 31/01/22	Est 2022/23	Est 2023/24	Future Years
	£000	£000	£000	£000	£000	£000	£000	
Communities								
Lady Alice Bowling Club Refurb	210	18	0	0	0	92	100	0
Indoor Sports Facility For Tennis	635	0	600	97	95	500	38	0
Leisure Pitches AMP - Lifecycle Fund	1,165	0	172	178	178	395	592	0
Grievie Road Community Centre	200	172	28	28	0	0	0	0
Wemyss Bay Community Centre Refurbishment	100	94	6	6	0	0	0	0
Whinhill Golf Club Lifecycle Works	250	66	174	174	101	10	0	0
WLC - Moveable Pool Floor	325	10	300	26	17	269	20	0
Watt Institution Creativity Space	55	0	50	50	41	5	0	0
PG New Community Hub (King George VI Building)	1,534	0	0	96	34	1,100	338	0
Complete On Site	12	0	7	7	0	0	5	0
	4,486	360	1,337	662	466	2,371	1,093	0
TOTAL	4,486	360	1,337	662	466	2,371	1,093	0

EARMARKED RESERVES POSITION STATEMENT

COMMITTEE: Communities

<u>Project</u>	<u>Lead Officer/ Responsible Manager</u>	<u>Total Funding 2021/22</u> £000	<u>Phased Budget Period 9 2021/22</u> £000	<u>Actual Period 9 2021/22</u> £000	<u>Projected Spend 2021/22</u> £000	<u>Amount to be Earmarked for 2022/23 & Beyond</u> £000	<u>Lead Officer Update</u>
Community Fund (Participatory Budgets)	Tony McEwan	92	12	27	67	25	Payments made to Inverkip Community Centre & Gourrock Park Bowling Club
Total		92	12	27	67	25	

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education, Communities and Organisational Development	Report No:	EDUCOM/25/22/HS
Contact Officer:	Hugh Scott, Service Manager	Contact No:	01475 712472
Subject:	Communities Performance Report - Capital Programme Progress and Asset Related Items		

1.0 PURPOSE

- 1.1 The purpose of this report is to consider performance reporting for the Communities part of the Education and Communities Committee and provide an update in respect of the status of the projects forming the Communities Capital Programme.

2.0 SUMMARY

- 2.1 This report advises the Committee of the progress of the projects within the Communities Capital Programme and those external grant funded projects where the Council holds all or part of the grant funding for projects being progressed through partner organisations.
- 2.2 The report also provides an update on other Council Community Asset related activity.

3.0 RECOMMENDATIONS

- 3.1 That the Committee notes the current position of the 2021/24 Capital Programme and the progress on the specific projects.

Ruth Binks
Corporate Director
Education, Communities and
Organisational Development

4.0 BACKGROUND

- 4.1 This report shows the current position of the approved Communities Capital programme reflecting the allocation of resources approved by Inverclyde Council on 18 March 2021.
- 4.2 The report also covers progress of external partner projects where the Council holds all or part of the funding through successful bids as part of the Scottish Government Regional Capital Grant Fund process.

5.0 COMMUNITIES CAPITAL PROJECTS

5.1 Lady Alice Bowling Club

The Council continues to support the management committee of Lady Alice Bowling Club to source external funding to match the shortfall required in respect of the building and project costs. The club has advised that it now has a plan in place in respect of the work it wishes to carry out and officers have now requested that the club moves towards achieving cost certainty for the improvement works.

5.2 Indoor Sports Facility for Tennis

The Council and Inverclyde Leisure continue to engage with all stakeholders to the project, including funding partners, sportscotland and the Lawn Tennis Association. Work is ongoing to achieve cost certainty for the project and this is expected by the end of February 2022.

5.3 Leisure Pitches Asset Management Plan / Lifecycle Fund

The lifecycle works continue to be progressed based on the asset plan agreed at the September 2020 Education & Communities Committee. Tenders have been issued for the 3G pitch carpet replacement at Battery Park with tender issue imminent for the Drumshantie Road 3G pitch carpet replacement.

5.4 Grieve Road Community Centre

As previously reported, all works are now complete with the exception of the installation of new high level windows in the main hall and alterations to form a disability compliant toilet / relocation of an office. SER certificate now obtained with building warrant and letter of acceptance imminent.

5.5 Wemyss Bay Community Centre

As previously reported, all works are now complete with the exception of the installation of new high level windows in the main hall. Building warrant is in place. Contractor has now been appointed and work was planned to begin on site mid-February 2022.

5.6 Whinhill Golf Club Lifecycle Works

Replacement of windows, doors and security shutters is complete as previously reported including fencing / security improvements. Work on the 'Starter's Room' project is progressing with completion anticipated late March / early April. Design work is progressing on options for replacement of the existing oil fire heating system with consideration of conversion to air source heat pump. Further phased works have been scoped and will be considered for progression subject to further allocation of funding from the Core Property budget within Environment & Regeneration.

5.7 Waterfront Leisure Centre Training Pool Moveable Floor

Tenders have now been issued with return date of 28 February 2022.

5.8 Watt Institution Creativity Space

National Heritage Lottery Funding has been secured through the 'Watt Voices' project to address internal alterations to an existing office space and formation of a creativity space. Works commenced on site 25 October 2021 with completion originally anticipated end of January / beginning of February 2022. Additional works have been instructed with completion now anticipated mid February 2022.

5.9 Community Hub King George VI

The Council was originally awarded funding of £1.184m from The Scottish Government Regional Capital Grant Fund (RCGF) for the second phase relating to the refurbishment and conversion of the King George VI building in Port Glasgow into a community facility. An additional allocation of RCGF funding of £350K was also made to allow the carbon reduction proposals to be incorporated in the project scope. Property Services have progressed the design which involves the refurbishment and conversion of the building including improving the fabric performance and a low carbon heating / energy approach in recognition of the move towards zero carbon building standards and the recently approved Inverclyde Net Zero Strategy. Listed Building Consent has been received with formal planning approval awaited and building warrant submitted. The target programme remains as previously reported with issue of tenders imminent to allow the conclusion of the formal tendering exercise including acceptance of contract by the end of 1st Quarter 2022.

6.0 COMMUNITIES EXTERNAL PARTNER PROJECTS

6.1 Craigend Resource Centre

Construction work on the Craigend Resource Centre phase 1 is now completed and the management committee have now taking ownership of the new centre. This new facility gives the East End of Greenock an amazing new modern space for residents of the area and wider community. Phase 2 of the work has now began to demolish the old building and upgrade to surrounding area, include the construction of new car park and toddlers play park.

6.2 The Inverclyde Shed Meet, Make + Share

The Scottish Government Regional Capital Grant Fund (RCGF) to transform a vacant light industrial unit in East Blackhall Street into a community workshop. The Committee is requested note that further engagement with Scottish Government has resulted in an additional allocation of RCGF funding for the project in the amount of £50K which will allow additional upgrades to new facility.

6.3 Parklea Branching Out

Officers are working closely with the Committee to support the application and action plan moving forward into 22/ 23 financial year.

7.0 IMPLICATIONS

7.1 Finance

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

7.2 Legal

There are no known Legal implications contained within this report.

7.3 Human Resources

There are no known Human Resources implications contained within this report.

7.4 Equalities

Equalities

(a) Has an Equality Impact Assessment been carried out?

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

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
X	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

	YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.
X	NO

7.5 Repopulation

The regeneration works outlined in this report should contribute to retaining and increasing the population within the area. There are no repopulation implications contained within this report.

8.0 CONSULTATIONS

8.1 None.

9.0 BACKGROUND PAPERS

9.1 None.

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Ruth Binks, Corporate Director, Education, Communities and Organisational Development	Report No:	EDUCOM/20/22/TM
Contact Officer:	Tony McEwan, Head of Culture, Communities and Educational Resources	Contact No:	01475 712828
Subject:	Communities Update Report – Overview of National and Local Initiatives		

1.0 PURPOSE

- 1.1 The purpose of this report is to update the Education and Communities Committee on developments pertaining to the communities part of the Committee.

2.0 SUMMARY

- 2.1 Updates are provided on the following:

- Implementation of Free Travel Passes for U22s;
- Partnership Recovery Plan progress; and
- Governance of external organisations including Inverclyde Leisure and The Beacon

3.0 RECOMMENDATIONS

- 3.1 It is recommended that the Education and Communities Committee notes the content of this report.

Ruth Binks
Corporate Director
Education, Communities and Organisational Development

4.0 UPDATES

4.1 Implementation of Free Travel Scheme for U22s

The Free Transport Scheme for those under age 22 was introduced by the Scottish Government in January 2022. The service continues to work alongside the Improvement Service, Transport Scotland and National Entitlement Card Programme Office to provide entitlement cards to young people under 22 years old. The application process and distribution of the cards are progressing well with our schools assisting in the tracking and distribution of NECs across Inverclyde. Once written consent from parents of pupils under 16 is provided, cards are being issued.

4.2 Partnership Recovery Plan

Below are pertinent updates on the Communities part of the Education, Culture and Sport Partnership Recovery Plan.

Summer of Fun – it is anticipated that Scottish Government funding will be allocated to provide some activities linked to deprivation during the summer of 2022. At the time of writing details and criteria of the funding is not available.

Duke of Edinburgh – after a delay in recruitment, staff are now in place to provide extra opportunities for Duke of Edinburgh.

Culture Recovery - activities carried out in this reporting period include: planning the second half of the Culture Collective programme following the submission of the interim report; continuing artist and writer residencies; a series of conversation with partners working in health and social care looking at creativity as a driver for improving health and wellbeing; large and well-attended Christmas event run by RIG Arts “Light Up Glen” at Auchmountain Glen on 12 December 2021; 8 schools participating in TRANCND projection of artworks onto buildings; well attended weekly art class at the Beacon; and rehearsing *Godspell* (Kayos Youth Theatre). A project evaluator has also been appointed.

New funding of £4m specifically for Culture Collective was announced in December 2021 by the Minister for Culture in a statement on supporting culture in Scotland. Much of this funding will be used to expand, extend and develop existing programmes. Officers will work up an application to this additional fund for a maximum of 65% of the original award, which would be a total of c. £178,000 in Inverclyde. The additional funding would also extend the end date of the programme from September 2022 to September 2023. Updates on the additional funding will be reported to the Committee in due course.

Gourock Amphitheatre lights - We are waiting on parts to arrive for the Gourock Amphitheatre lighting, this is still however on track to be completed by the end March 2022.

Active Inverclyde - The working group has now met to take forward Active Inverclyde, the group will be arranging a number of listening events with stakeholders and sport groups in the near future. We are now finalising the design phase of the all the new signage for Rankin Park.

Meliora - Main events will be in May and June 22. There are three anchor events: pipe band championship, outdoor obstacle event (IL) and arts festival (Beacon) and, if required, for ancillary events as part of the wider 'Meliora Festival' theme. Marketing theme in place, communications plan developed and partners in place to deliver the three anchor events.

Meliora community events - Applications for locality events opened on 31 January 2022 with a turnaround of 4 weeks. The funding agreement for the CVS funding has now been completed and the allocation of funding have been transferred over to CVS, the applications are now opened to the community.

Small grants are now available for the recovery of community groups through CVS.

5.0 GOVERNANCE OF EXTERNAL ORGANISATIONS

5.1 Inverclyde Leisure (IL)

Regular governance meetings continue to take place with the Council and IL in addition to Council officer attendance at IL board meetings. IL currently reports strong progress in relation to its recovery from the impact of COVID-19 and continues to acknowledge the financial support from Inverclyde Council which has been critical to its recovery. The projected additional subsidy for 21/22 is £1.174m which is £502k less than originally allocated. For 2022/23 officers have allowed for an additional subsidy of £798k but await updated projections from IL. The £502K not required in 2021/22 will be returned to the Council's COVID contingency. It is simply not known how the sports and leisure industry will recover over time post Covid and how much of an impact different lifestyle choices, different working patterns and the financial climate will have over the next few years and as such the Policy & Resources Committee agreed in November that a detailed review of IL assets & funding should be undertaken in preparation for the 2023/24 Budget.

5.2 The Beacon Arts Centre

Officers have continued attendance at the board as well as oversight of the finance and general purposes sub-committee. The cancellation of performances of the pantomime due to COVID-19 restrictions was disappointing and inevitably impacted upon recovery but this has been balanced to some extent by the receipt of grants. The Beacon is reporting good progress in its recovery and the current position is better than might have been anticipated, helped by external funding. As with the leisure sector, cultural settings will have an uphill battle going forward and the full impact of COVID is as yet unknown.

5.3 Governance of self-managed community centres

Service level agreements are in place for all organisations and Council officers continue to hold regular governance meetings, with no issues to report in respect of their financial position. Regular governance meetings have been taking place in line with the service level agreements with:

- Branchton Community Centre;
- Kilmacolm New Community Centre;
- Craigend Resource Centre;
- Gibshill Community Centre;
- Inverkip Hub; and
- Youth Connections

6.0 IMPLICATIONS

6.1 Finance

N/A

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

6.2 **Legal**

N/A.

6.3 **Human Resources**

N/A.

6.4 **Equalities**

Equalities

(a) Has an Equality Impact Assessment been carried out?

<input type="checkbox"/>	YES
<input checked="" type="checkbox"/>	NO – This report does not introduce a new policy, function or strategy or recommend a substantive change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

<input type="checkbox"/>	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
<input checked="" type="checkbox"/>	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

X

YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.

NO

6.5 Repopulation

N/A.

7.0 CONSULTATIONS

7.1 N/A.

8.0 BACKGROUND PAPERS

8.1 N/A.

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education Communities and Organisational Development	Report No:	EDUCOM/16/22/AW
Contact Officer:	Alana Ward, Service Manager	Contact No:	01475 712330
Subject:	McLean Museum and Art Gallery Management Policies and Service Improvement Plan 2022-25		

1.0 PURPOSE

- 1.1 The purpose of this report is to seek Committee approval for updated management policies on collections care and conservation, documentation, and access, and also a Service Improvement Plan 2022-25 for the McLean Museum and Art Gallery.

2.0 SUMMARY

- 2.1 The Collections Care and Conservation, Documentation, and Access policies for the McLean Museum and Art Gallery have been updated, and a Service Improvement Plan 2022-25 has been developed. The adoption and implementation of these policies and plans by the Inverclyde Council, the governing body of the McLean Museum and Art Gallery, is a requirement of the Arts Council England (ACE) Accreditation Scheme which sets nationally agreed standards for museums in the UK.
- 2.2 Formal approval of these management policies and Service Improvement Plan by the Committee was not a requirement of the previous Accreditation Standard (2013) but it is a requirement of the revised Accreditation Standard (2018). The 2013 versions of these policies and plans were approved by the Head of Inclusive Education, Culture and Corporate Policy in 2013 rather than the Education and Communities Committee. There have been no substantial changes made to any of the policies and those revisions that have taken place are for reasons of brevity and clarity only. The draft revised Museum management policies and Service Improvement Plan 2022-25 can be viewed at: <https://www.inverclyde.gov.uk/community-life-and-leisure/heritage-services/museum/policies-and-management>

3.0 RECOMMENDATIONS

- 3.1 It is recommended that the Committee:
- approves the McLean Museum and Art Gallery Collections Care and Conservation Policy, Documentation Policy and Access Policy, and the Service Improvement Plan 2022-25 to meet the requirements of the Arts Council England Accreditation Scheme; and
 - refers the decision of the Committee to the next meeting of the Inverclyde Council for noting as Trustees of the Watt Institution.

4.0 BACKGROUND

- 4.1 The adoption and implementation of Collections Care and Conservation, Documentation, and Access policies, as well as a Service Improvement Plan 2022-25, for the McLean Museum and Art Gallery by the Inverclyde Council, the governing Body of the McLean Museum and Art Gallery, is a requirement of Arts Council England (ACE) Accreditation Scheme for museums in the UK.
- 4.2 The McLean Museum and Art Gallery currently enjoys Accredited Status within the Scheme and seeks to retain this status as it is a benchmark standard which attracts Government funding. Museums that do not meet the standard do not receive Government grants.
- 4.3 These policies and plans supersede all previous and existing policies and plans, formal or informal, relating to the management of the museum. There have been no substantial changes made to the policies and those revisions that have taken place are for reasons of brevity and clarity only. The revised management policies and Service Improvement Plan 2022-25 can be viewed at: <https://www.inverclyde.gov.uk/community-life-and-leisure/heritage-services/museum/policies-and-management>

5.0 IMPLICATIONS

5.1 Finance

There are no known financial implications arising from this report.

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

5.2 Legal

The Head of Legal & Democratic Services comments that, as the Watt Institution is held and administered by the Council as Trustees, any recommendation of this Committee will require to be referred to the Trustees of the Watt Institution for noting.

5.3 Human Resources

There are no known Human Resources implications arising from this report.

5.4 Equalities

Equalities

- (a) Has an Equality Impact Assessment been carried out?

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

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report’s recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report’s recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
X	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

	YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.
X	NO

5.5 Repopulation

The Watt Institution is a key part of Inverclyde’s tourism, culture and heritage offer, providing services to visitors and residents of Inverclyde.

6.0 CONSULTATIONS

7.1 None

8.0 BACKGROUND PAPERS

- 8.1 DRAFT McLean Museum and Art Gallery Collections Conservation and Care Policy
- DRAFT McLean Museum and Art Gallery Documentation Policy
- DRAFT McLean Museum and Art Gallery Access Policy
- DRAFT McLean Museum and Art Gallery Service Improvement Plan 2022-25

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education, Communities and Organisational Development	Report No:	EDUCOM/15/22/MR
Contact Officer:	Michael Roach	Contact No:	01475 712850
Subject:	Education Scotland Follow Through Report on Lady Alice Primary School and Nursery Class		

1.0 PURPOSE

- 1.1 The purpose of this report is to inform the Education & Communities Committee of the recent Education Scotland follow through visit of Lady Alice Primary School and Nursery Class.

2.0 SUMMARY

- 2.1 Lady Alice Primary School and Nursery Class was inspected in October 2019, under Education Scotland's full inspection model. The inspection focused on evaluating the school's work against the four Quality Indicators used for full inspections as well as evaluating the work of the Nursery Class.
- 2.2 The report published in January 2020 outlined numerous strengths including the Head Teacher creating a strong collaborative team and the staff's teamwork, together with their willingness, to adopt leadership roles to help the school bring about necessary improvements. As well as this the report referenced the supportive environment in the school, and the positive relationships between children and staff. Children were described as motivated, enjoying their learning and were increasingly engaged in tasks and activities are also acknowledged.
- 2.3 The report also identified areas for improvement, which included:
- Strengthening approaches to monitoring and evaluating the work of the school, including the nursery class to drive forward necessary improvements;
 - Improving approaches to learning and teaching in the nursery class;
 - Building on existing good practice by further developing approaches to assessing children's progress, in order to raise the attainment of all;
 - Streamlining approaches to planning to ensure improved outcomes for children who require additional support. In doing so, targets within children's individual plans should be regularly monitored and evaluated to ensure children make the best possible progress.
- 2.4 During the Autumn term of 2021/22 Education Scotland announced that they would resume their scrutiny programme with an initial focus on carrying out follow through visits that had been due to take place at the start of the pandemic in March 2020.
- 2.5 Lady Alice Primary School had a follow through visit led by an HMI, in partnership with the school and Education Officer for one day during November 2021.
- 2.6 The HMI agreed that the school had made very good progress overall towards the areas for improvement identified above and that no further visits would be made in connection to the 2020 inspection report.

- 2.7 Particular praise was made of the school's response to the Covid 19 Pandemic, its support for families and its ongoing focus, despite the pandemic, on continuing to improve and address the areas for improvement above.

3.0 RECOMMENDATIONS

- 3.1 It is recommended that the Education & Communities Committee notes the Education Scotland follow through letter on Lady Alice Primary School and Nursery Class.

Ruth Binks
Corporate Director
Education, Communities & Organisational Development

4.0 BACKGROUND

4.1 As part of Education Scotland's inspection framework, Lady Alice Primary School and Nursery Class was inspected in October 2019. Education Scotland staff and associate assessors from education authorities, evaluated the education provision provided within the school.

4.2 The inspection covered key aspects of the work of the school at all stages, identified key strengths and areas for improvement.

The framework for this inspection included reviewing quality indicators (QIs) which enabled Education Scotland to evaluate aspects of:

- 1.3 Leadership of change
- 2.3 Learning, teaching and assessment
- 3.1 Ensuring wellbeing, equality and inclusion
- 3.2 Raising attainment and achievement

4.3 Education Scotland assessed and reported on the views of parents, pupils and staff, the quality of learning and teaching and how well the school was raising attainment and achievement for all pupils.

4.4 The report, published in January 2020, identified strengths as well as areas for improvement. The school was graded against the four QIs in 4.2. These were:

QI number	QI focus	School	Nursery Class
1.3	Leadership of change	satisfactory	weak
2.3	Learning, teaching and assessment	good	weak
3.1	Ensuring wellbeing, equality and inclusion	good	satisfactory
3.2	Raising attainment and achievement	satisfactory	satisfactory

4.5 Four areas for improvement were also identified. These were:

- Strengthening approaches to monitoring and evaluating the work of the school, including the nursery class to drive forward necessary improvements;
- Improving approaches to learning and teaching in the nursery class;
- Building on existing good practice by further developing approaches to assessing children's progress, in order to raise the attainment of all;
- Streamlining approaches to planning to ensure improved outcomes for children who require additional support. In doing so, targets within children's individual plans should be regularly monitored and evaluated to ensure children make the best possible progress.

4.6 In November 2021 Education Scotland carried out a follow through visit of the school and nursery class as indicated would be the case in the 2020 report. This had been delayed due to the Covid 19 Pandemic.

5.0 FOLLOW THROUGH REPORT

5.1 Lady Alice Primary School and Nursery class has received a very positive follow through letter from Education Scotland which outlines the progress made in the key areas identified for improvement. As a result there will be no further visits made by Education Scotland in relation to the report of March 2019.

The initial section of the letter written by Education Scotland as the outcome of their visit to the school, outlines the response to supporting pupils and families during the Covid 19 pandemic. It reports that the head teacher has skilfully managed the process and has been supported very well by the local authority.

The letter also states that, *“To support recovery and children’s return to school, senior leaders and staff have prioritised the wellbeing of their children and families. Staff have responded effectively to the emerging needs of the local community as a result of COVID-19 restrictions. Senior leaders and staff worked together to develop further their communication approaches during the pandemic. Parents and carers report the levels of support, care and communication received as being essential to their family wellbeing during the COVID-19 pandemic.”*

- 5.2 The letter also acknowledges the work of the school in prioritising transitions for pupils prior to August 2021: *“Children making the transition between the nursery class and P1, and P7 to S1, were supported by virtual tours, interactive maps and sharing of information leaflets.”*
- 5.3 The letter outlines the school’s prioritisation of partnership working during this time: *“Senior leaders and staff recognise the importance of effective partnerships to support recovery, help identify wellbeing concerns and address gaps in children’s learning. Partner providers including the local authority Educational Psychology service, a Barnardo’s family support worker and a Community Learning and Development attainment challenge worker assisted school staff with the delivery of learning packs and food parcels.”*
- 5.4 The letter identifies that very good progress has been made in strengthening approaches to monitoring and evaluating the work of the school.
- 5.5 As well as this, good progress in improving learning and teaching in the nursery class has been identified: *“Use of national practice guidance for early years in Scotland has led to improvements in the learning environment. As a result, children’s engagement, independence and their ability to increasingly make choices and decisions about their learning has improved. Since the original inspection, the outdoor learning space for the nursery class has been significantly developed. It is now a more stimulating environment where children access resources independently, develop problem solving skills and experience open ended materials that support creativity and team work.”*
- 5.6 Significant progress has been made in further developing approaches to assessing children’s progress in order to raise attainment of all. There has also been very good progress made in streamlining approaches to planning to ensure improved outcomes for children who require additional support.
- 5.7 The report highlights the work of the depute head of the nursery class in leading improvements in the quality of planning in the nursery class.
- 5.8 The report states that the depute headteacher has, *“played a significant role in the implementation and evaluation of updated approaches, systems and policies. There are positive and productive relationships with agencies that provide and support the school with training, information and resources. This supports children with additional and complex needs. Parents comment very positively about the support they have received from the school which has helped their children make the best possible progress”*.

6.0 IMPLICATIONS

6.1 Finance

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

6.2 Legal

N/A.

6.3 Human Resources

N/A.

6.4 Equalities

Equalities

(a) Has an Equality Impact Assessment been carried out?

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

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
✓	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

✓

YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.

NO

6.5 Repopulation

N/A.

7.0 CONSULTATIONS

7.1 N/A.

8.0 BACKGROUND PAPERS

8.1 The inspection reports for Lady Alice Primary School can be accessed here:

<https://education.gov.scot/education-scotland/inspection-reports/reports-page/?id=3315>

Report To: Education & Communities Committee

Report By: Interim Director of Finance & Corporate Governance and Corporate Director Education, Communities & Organisational Development

Contact Officer: Iain Cameron

Subject: Education Revenue & Capital Budget Report - 2021/22 Projected Out Turn at Period 9 to 31 December 2021

Date: 8 March 2022

Report No: FIN/13/22/AP/IC

Contact No: 01475 712832

1.0 PURPOSE

- 1.1 To advise the Committee of the 2021/22 Education Revenue and Capital Budget positions as at Period 9 to 31 December 2021.

2.0 SUMMARY

- 2.1 The total Education revenue budget for 2021/22, excluding earmarked reserves, is £85.909 million. The School Estate Management Plan accounts for £10.635 million of the total Education revenue budget. The latest projection at Period 9, up to end of December 2021, is an underspend of £257,000, an increase in expenditure of £16,000 since last Committee.
- 2.2 The main variances relating to the 2021/22 revenue budget projected underspend are –
- (a) Within Employee Costs there is a projected underspend of £189,000 for Teachers Employee Costs mainly as a result of vacant posts within Psychological Services and Early Years Education; a projected underspend of £44,000 for Education Non Teacher Employee Costs, mainly due to vacant posts within Community Learning and Development; and a projected underspend of £84,000 for Facilities Management Employee Costs.
 - (b) Within Property Costs, there are projected underspends of £51,000 for Non Domestic Rates (NDR) and £79,000 for Utilities, due to lower consumption. (£30,000 for Biomass Fuel, £10,000 for Electricity, £22,000 for Gas and £17,000 for Water.)
 - (c) Projected underspend of £65,000 for FM Catering Provisions linked to the reduction in school meal income.
 - (d) Projected overspend of £40,000 for Education IT Charges.
 - (e) Projected underspend of £65,000 for SPT School Buses, partially offset by a projected overspend of £24,000 for Pupil Consortium Travel.
 - (f) Projected underspend of £30,000 for Early Year's Framework expenditure.
 - (g) Projected under recoveries in School Meal Income and Breakfast Club income of £300,000 and £40,000 respectively, due to lower than budgeted uptake.

(h) Projected under recovery of £166,000 for Facilities Management Income (Cleaning £75,000 under recovered, Catering £109,000 under recovered and Janitors over recovered £18,000.) The Income under recovery is due to projected underspends for FM Catering Provisions and FM Employee Costs.

- 2.3 The Education 2021/24 Capital Budget is £19.418 million with £5.408 million projected to be spent in the current Financial Year. The original budgeted expenditure was £4.280 million for current year resulting in accelerated expenditure of £1.128 million (26%). Expenditure at 31 January 2022 was £3.977million or 74% of the projected expenditure for 2021/22. The costs of the overall Capital Programme are being contained within existing budgets. Appendix 4 gives more financial information by project with updates on physical progress of projects provided elsewhere on this agenda.
- 2.4 Earmarked Reserves for 2021/22, excluding those for Asset Plans and Strategic Funds total £4.012 million of which £1.931 million is projected to be spent in the current Financial Year. To date expenditure of £1.006 million (52%) has been incurred. Spend to date per profiling was expected to be £1.112 million, therefore slippage to date is £106,000 (10%).

3.0 RECOMMENDATIONS

- 3.1 That the Committee note the projected underspend of £257,000 for the 2021/22 Education Revenue budget as at Period 9 to 31 December 2021.
- 3.2 That the Committee note the financial position of the specific capital projects detailed in Appendix 4 and note that the cost of the current Education Capital Programme is being contained within existing budgets.

Alan Puckrin
Interim Director of Finance
& Corporate Governance

Ruth Binks
Corporate Director Education, Communities &
Organisational Development

4.0 BACKGROUND

- 4.1 The purpose of this report is to advise Committee of the current position of the 2021/22 Education Revenue and Capital Budgets as at Period 9 to 31 December 2021 and to highlight the main variances contributing to the projected underspend of £257,000 for the 2021/22 revenue budget.

5.0 2021/22 REVENUE BUDGET PROJECTED OUT TURN

- 5.1 The total Education revenue budget for 2021/22, excluding earmarked reserves, is currently £85.909 million. This is a decrease of £5.528 million from the approved budget. Appendix 1 gives details of the budget movements responsible for this decrease. The latest projection is an underspend of £257,000, an increase in expenditure of £16,000 since Period 7.
- 5.2 The main issues to highlight in relation to the 2021/22 projected underspend of £257,000 are:

Employee Costs - Teachers

The current budget for Teachers Employee Costs is £51.029 million and the latest projection is an underspend of £189,000 which is a decrease in expenditure of £20,000 since last Committee. The majority of the projected underspend relates to vacant posts within Psychological Services. It should be noted that in addition to core staffing there are now an additional 46.8fte Covid Recovery Teachers employed using a combination of Scottish Government grant funding and Early Years 1140 underspend.

Employee Costs – Non Teachers

The current budget for Non Teacher Employee Costs is £28.924 million and the latest projection is an underspend of £128,000, the same as reported to last Committee. Facilities Management employees are projected to underspend by £84,000. An over spend of £19,000 for Janitors and Public Convenience Employees is offset by under spends of £75,000 for Cleaning and £28,000 for Catering. Education Non Teacher Employee Costs are currently projected to underspend by £44,000. An overspend of £62,000 within Schools and Education Headquarters is offset by an underspend of £107,000 within Community Learning and Development.

Non Domestic Rates (NDR)

The current budget for Non Domestic Rates is £3.353 million and the latest projection is an underspend of £51,000 which is due to successful Rateable Value appeals. The projected underspend is the same as reported to last Committee.

Utilities

The current projected underspend for Utilities is £79,000. This is made up of £30,000 for Biomass Fuel, £10,000 for Electricity, £22,000 for Gas and £17,000 for Water. The Biomass plant at Port Glasgow Community Campus has been offline for several months and there has been lower than expected consumption in school buildings.

Education Contract Cleaning

The current budget for Education Contract Cleaning is £1.230 million and the latest projection is an underspend of £75,000, an increase in expenditure of £10,000 since last Committee. The projected underspend is due to vacant posts within Facilities Management. There is a corresponding underspend in Employee Costs and shortfall in Income within Facilities Management.

Facilities Management Catering Provisions

The current budget for Catering Provisions is £980,000 and the latest projection is an underspend of £65,000, the same as reported to last Committee. A saving due to a reduction in the number of school meals being produced is partially offset by an increase in food provisions costs post Covid. There is a corresponding under recovery of Facilities Management Income as a result of this underspend.

Education Catering Contract

The current budget for Education Catering Contract is £3.435 million and the latest projection is an underspend of £93,000, an increase of £3,000 since last Committee. This projected underspend is due to the underspends for Facilities Management Employee Costs and Provisions noted above.

Education IT Charges

The current budget for Education IT Charges is £98,000 and the latest projection is an overspend of £40,000, the same as previously reported to Committee.

SPT School Buses

The current budget for SPT School Buses is £1.190 million and the latest projection, based on information supplied by SPT, is an underspend of £65,000, an increase in expenditure of £35,000 since last Committee.

Pupil Consortium Travel

The current budget for Pupil Consortium Travel is £60,000 and the latest projection is an overspend of £24,000, the same as previously reported to Committee.

Early Years Framework

Early Years Framework is projected to underspend by £30,000, the same as previously reported to Committee.

School Meal Income

The total budget for School Meal Income is £1.022 million and the latest projection is an under recovery in income of £300,000, the same as previously reported to Committee.

Breakfast Clubs Income

The budget for Breakfast Clubs Income is £50,000 and the latest projection is a shortfall in income of £40,000. This is the same as previously reported to Committee and is due to fewer pupils using the service.

Facilities Management Income

The current budget for Facilities Management Income is £6.250 million and the latest projection is an under recovery of £166,000 - £109,000 relates to Catering and £75,000 to Cleaning due to the projected underspends reported above. The balance relates to Janitors.

Appendices 2 and 3 provide more details on the projected variances

6.0 2021/24 CAPITAL BUDGET PROJECTION

6.1 The Education 2021/24 Capital Budget is £19.418 million with £5.408 million projected to be spent in the current Financial Year. The original budgeted expenditure was £4.280 million for current year resulting in accelerated expenditure of £1.128 million (26%). Expenditure at 31 January 2022 was £3.977million or 74% of the projected expenditure for 2021/22. The costs of the overall Capital Programme are being contained within existing budgets. Appendix 4 gives more financial information by project with updates on physical progress of projects provided elsewhere on this agenda.

7.0 EARMARKED RESERVES

7.1 Earmarked Reserves for 2021/22, excluding those for Asset Plans and Strategic Funds total £4.012 million of which £1.931 million is projected to be spent in the current Financial Year. To date expenditure of £1.006 million (52%) has been incurred. Spend to date per profiling was expected to be £1.112 million, therefore slippage to date is £106,000 (10%).

8.0 VIREMENTS

8.1 There are no virements this Committee cycle.

9.0 IMPLICATIONS

9.1 Finance

All financial implications are discussed in detail within the report above.

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

Annually Recurring Costs / (Savings)

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

9.2 Legal

There are no specific legal implications arising from this report.

9.3 Human Resources

There are no specific human resources implications arising from this report.

9.4 Equalities

Equalities

- (a) Has an Equality Impact Assessment been carried out?

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

- (b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
X	NO

- (c) Data Protection

Has a Data Protection Impact Assessment been carried out?

	YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.
X	NO

9.5 Repopulation

There are no repopulation issues with this report.

10.0 CONSULTATION

- 10.1 The paper has been jointly prepared by the Interim Director of Finance & Corporate Governance and the Corporate Director Education, Communities & Organisational Development.

11.0 BACKGROUND PAPERS

- 11.1 There are no background papers for this report.

Education Budget Movement - 2021/22**Period 9 - 1st April 2021 to 31st December 2021**

Service	Approved Budget	Movements			Transferred to EMR £000	Revised Budget 2021/22 £000
	2021/22 £000	Inflation £000	Virement £000	Supplementary Budgets £000		
Corporate Director	148					148
Education	76,992	(3)	(4,567)	594	(1,678)	71,338
Inclusive Education	14,189	10	116			14,315
Facilities Management	108					108
Totals	91,437	7	(4,451)	594	(1,678)	85,909

Movement Detail**External Resources**

Probationer Teachers

£000

594

594**Virements**

SEMP to Loan Charges
Alcohol Team from HSCP to CLD
Remove Music Tuition Fees Budget
From Communities for Swim Lessons
Cleaning Reallocation

(4,588)

88

35

16

(2)

(4,451)**Inflation**

SEMP
Water
Speech & Language Therapy

45

(48)

10

7(3,850)

EDUCATION**REVENUE BUDGET MONITORING REPORT****CURRENT POSITION****Period 9 - 1st April 2021 to 31st December 2021**

2020/21 Actual £000	Subjective Heading	Approved Budget 2021/22 £000	Revised Budget 2021/22 £000	Projected Out-turn 2021/22 £000	Projected Over/(Under) Spend £000	Percentage Over/(Under)
48,031	Employee Costs - Teachers	46,468	51,029	50,840	(189)	(0.4%)
27,423	Employee Costs - Non Teachers	26,598	28,924	28,796	(128)	(0.4%)
17,921	Property Costs	14,300	14,277	14,090	(187)	(1.3%)
5,429	Supplies & Services	5,343	5,802	5,652	(150)	(2.6%)
2,137	Transport Costs	2,210	2,150	2,082	(68)	(3.2%)
633	Administration Costs	672	668	657	(11)	(1.6%)
8,150	Other Expenditure	16,302	12,095	12,065	(30)	(0.2%)
(23,292)	Income	(20,456)	(28,736)	(28,230)	506	(1.8%)
86,432	TOTAL NET EXPENDITURE	91,437	86,209	85,952	(257)	(0.3%)
0	Earmarked Reserves	0	0	0	0	
0	Loan Charges / DMR	0	(300)	(300)	0	
(2,376)	Additional Funding Covid-19	0	0	0	0	
84,056	TOTAL NET EXPENDITURE excluding Earmarked Reserves	91,437	85,909	85,652	(257)	

2020/21 Actual £000	Objective Heading	Approved Budget 2021/22 £000	Revised Budget 2021/22 £000	Projected Out-turn 2021/22 £000	Projected Over/(Under) Spend £000	Percentage Over/(Under)
160	Corporate Director	148	148	156	8	5.4%
62,390	Education	61,814	60,460	60,443	(17)	(0.0%)
94	Facilities Management	108	108	109	1	0.9%
9,974	School Estate Management Plan	15,178	10,635	10,635	0	-
72,458	TOTAL EDUCATION SERVICES	77,100	71,203	71,187	(16)	(0.0%)
10,070	ASN	10,395	10,910	10,753	(157)	(1.4%)
1,656	Community Learning & Development	1,713	1,749	1,641	(108)	(6.2%)
2,088	Other Inclusive Education	2,081	2,199	2,215	16	0.7%
13,814	TOTAL INCLUSIVE EDUCATION	14,189	14,858	14,609	(249)	(1.7%)
86,432	TOTAL EDUCATION COMMITTEE	91,437	86,209	85,952	(257)	(0.3%)
0	Earmarked Reserves	0	0	0	0	
0	Loan Charges / DMR	0	(300)	(300)	0	
(2,376)	Additional Funding Covid-19	0	0	0	0	
84,056	TOTAL EDUCATION COMMITTEE excluding Earmarked Reserves	91,437	85,909	85,652	(257)	

EDUCATION**REVENUE BUDGET MONITORING REPORT****MATERIAL VARIANCES****Period 9 - 1st April 2021 to 31st December 2021**

<u>Out Turn</u> <u>2020/21</u> <u>£000</u>	<u>Budget</u> <u>Heading</u>	<u>Budget</u> <u>2021/22</u> <u>£000</u>	<u>Proportion</u> <u>of Budget</u>	<u>Actual to</u> <u>31-Dec-21</u> <u>£000</u>	<u>Projection</u> <u>2021/22</u> <u>£000</u>	<u>(Under)/Over</u> <u>Budget</u> <u>£000</u>	<u>Percentage</u> <u>Over / (Under)</u>
48,031	Employee Costs -Teachers	51,029	41,486	41,310	50,840	(189)	(0.4%)
27,423	Employee Costs - Non Teachers	28,924	21,981	21,836	28,796	(128)	(0.4%)
3,292	Non Domestic Rates (NDR)	3,353	3,353	3,302	3,302	(51)	(1.5%)
481	Gas	525	350	256	503	(22)	(4.2%)
67	Biomass	84	63	10	54	(30)	(35.7%)
1,201	ED Cleaning Contract	1,230	923	858	1,155	(75)	(6.1%)
3,148	ED Catering Contract	3,435	1,431	1,209	3,342	(93)	(2.7%)
120	ED IT Charges	98	74	125	138	40	40.8%
287	FM Catering Provisions	980	735	686	915	(65)	(6.6%)
1,021	SPT School Buses	1,190	893	791	1,125	(65)	(5.5%)
84	Pupil Transport - Consortium	60	35	37	84	24	40.0%
20	Early Years Framework	37	28	7	7	(30)	(81.1%)
(283)	School Meal Income	(1,022)	(707)	(430)	(722)	300	(29.4%)
(2)	Breakfast Club Income	(50)	(35)	(6)	(10)	40	(80.0%)
(5,730)	FM Income	(6,250)	(4,688)	(4,268)	(6,084)	166	(2.7%)
Total Material Variances						(178)	

EDUCATION COMMITTEE

APPENDIX 4

CAPITAL BUDGET MONITORING REPORT

CURRENT POSITION

Period 9 - 1st April 2021 to 31st December 2021

Project Name	1	2	3	4	5	6	7	8
Est. Total Cost	Actual to 31/3/21	Approved Budget 2021/22	Revised Est. 2021/22	Actual to 30/11/22	Est.2022/23	Est.2023/24	Est.2024/25	Est. Future Years
£000	£000	£000	£000	£000	£000	£000	£000	£000
SEMP Projects								
Balance of Life Cycle Fund	7,589	0	737	1,000	934	1,000	4,588	1,001
Gourcock PS - Extension	3,084	1,567	466	600	380	850	67	
Hillend Childrens Centre - Refurbishment	1,484	883	551	551	526	50		
Kelly Street Landscaping (St Mary's PS)	261	24	187	227	219	10		
Demolish Sacred Heart PS	366	1	150	100	15	90	175	
Interactive Whiteboard Replacement	700	0	0	625	0	75		
CO2 Monitors In Schools	141	0	0	75	18	66		
Complete on site	156	0	6	6	0	0	150	
Total SEMP	13,781	2,475	2,097	3,184	2,092	2,141	4,980	1,001
ELC 1140 Projects								
Larkfield Childrens Centre - New Build	2906	1415	1345	1345	1100	100	46	
Rainbow Family Centre - Extension	2378	1572	697	697	651	85	24	
ELC Complete On Site	19	0	13	19	12	0		
TOTAL ELC Expansion	5,303	2,987	2,055	2,061	1,763	185	70	0
CFCR Projects								
Glenpark ELC Outdoors - CFCR	164	26	128	128	122	10		
Early Learning Centres Various - Direct Access / Canopies etc	170	0	0	35	0	135		
	334	26	128	163	122	145	0	0
TOTAL ALL PROJECTS	19,418	5,488	4,280	5,408	3,977	2,471	5,050	1,001

EARMARKED RESERVES POSITION STATEMENT

COMMITTEE: EDUCATION

<u>Project</u>	<u>Lead Officer/ Responsible Manager</u>	<u>Total Funding 2021/22</u> £000	<u>Phased Budget To Period 9 2021/22</u> £000	<u>Actual To Period 9 2021/22</u> £000	<u>Projected Spend 2021/22</u> £000	<u>Amount to be Earmarked for 2022/23 & Beyond</u> £000	<u>Lead Officer Update</u>
Beacon Arts Year of Young People Legacy	Tony McEwan Tony McEwan	87 30	0 0	0 0	0 30	87 0	Funding not required in 2021/22
Early Years 1140 c/f	Michael Roach	3,895	1,112	1,006	1,901	1,994	Has been on hold due to COVID restrictions. Projected expenditure is for Clyde Conversation event at end of Feb 22. £452k of c/f is committed, mostly on staff payments to end of Academic year with £1542k uncommitted. £1,373k is projected underspend for 2021/22 budget now transferred to EMR for use in future years when funding cut.
Total		4,012	1,112	1,006	1,931	2,081	

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education, Communities and Organisational Development	Report No:	EDUCOM/24 /22/EM
Contact Officer:	Eddie Montgomery	Contact No:	01475 712472
Subject:	Education Performance Report - Capital Programme Progress		

1.0 PURPOSE

- 1.1 The purpose of this report is to consider performance reporting for the Education part of the Education and Communities Committee and provide an update in respect of the status of the projects forming the Education Capital Programme.

2.0 SUMMARY

- 2.1 This report advises the Committee in respect of the progress of the projects within the Education Capital Programme including the 1140 Hours Expansion of Early Learning and Childcare.

3.0 RECOMMENDATIONS

- 3.1 That the Committee notes the current position of the 2021/24 Capital Programme and the progress on the specific projects.

Ruth Binks
Corporate Director
Education, Communities and
Organisational Development

4.0 BACKGROUND

- 4.1 This report shows the current position of the approved Education Capital programme reflecting the allocation of resources approved by Inverclyde Council on 18 March 2021.
- 4.2 The report also covers progress on the programme of works connected with the 1140 Hours Expansion of Early Learning and Childcare.

5.0 EDUCATION CAPITAL PROJECTS

5.1 Gourock Primary School Extension

The completion works contract was accepted through the use of Emergency Powers in April 2021. The Contractor commenced on site at the end of May 2021 and works are progressing on site. As verbally reported to the last Committee the Contractor is currently reporting behind programme and has applied for an extension of time with the overall programme to completion being closely monitored. Every effort is being made to complete the main phase in April which includes the new hall and remodelled office accommodation. The final smaller phases including clearing the site compound to allow the completion of the expanded car park will extend to the summer holidays when it is anticipated that the temporary modular accommodation will be removed from the existing playground.

5.2 Demolition of Former Sacred Heart Primary School

The demolition of the former Sacred Heart Primary School is included as phase 2 of the Larkfield Early Learning Centre new build project. The demolition contractor took possession of the building / site on Monday 14th February following confirmation of completed utility disconnections. Full completion is anticipated in 2nd quarter 2022.

6.0 SCHOOL ESTATE LIFECYCLE WORKS 2021/22

6.1 General Lifecycle Works

The lifecycle programme for the Education estate is informed from the external condition surveys carried out in connection with asset management and estate core fact reporting. The budget also addresses suitability issues identified from the surveys undertaken through Heads of each establishment and sufficiency issues identified through the continued monitoring of school rolls and projections. The 2021/22 programme works has been substantially completed with some minor floor covering works to be undertaken prior to the end of the current financial year. Property Services have commenced the review of condition and preparation of the outline plan of work for the 2022/23 programme

6.2 Public Partnership Schools (PPP) Lifecycle Works

The lifecycle programme for the four PPP schools is managed as part of the contract through the FM provider with monitoring via Property Services. The 2021/22 programme has been completed as previously reported with the 2022/23 programme currently being prepared for submission and Authority review / approval.

7.0 1140 HOURS EXPANSION PROJECTS

7.1 Various Early Years Establishment – Direct Access / Canopies / Environmental

An allocation of funds was made available from the projected early years revenue underspend to address improvements across a number of early years establishments associated with access to, and use of, external environments. Officers from Property Services are working with the Early Years team to progress proposals, with a number of

projects at various stages of progression. As previously reported, environmental improvement works were included as part of the recently completed Hillend Children's Centre project and will form part of the final account for that project. Free-flow / direct access related work is on-going over the February mid-term holiday at Blairmore Nursery school. Further prioritised works at Wemyss Bay Nursery Class and Kings Oak Nursery Class are being developed for progression to tender stage by the end of the current financial year. Works on those projects will be progressed in the next financial year with any additional projects subject to the extent of the available funding.

8.0 INTERACTIVE WHITEBOARD / ACTIVE PANEL REFRESH

8.1 The replacement of interactive whiteboards across the education estate and a longer term refresh programme of active panels was approved by the Education & Communities Committee as part of the 2021-28 Education Services Digital Learning Strategy. As previously reported, authority was sought to accelerate the 2022/23 interactive whiteboard refresh programme with a tender acceptance issued in early January. The works commenced at the end of January and will be complete by the end of the Easter holiday period. The contract will address all of the remaining interactive whiteboards across the estate through replacement with new active panels. The annual refresh programme thereafter will vary year to year in line with the age of the active panel equipment and the 7 year refresh cycle.

9.0 IMPLICATIONS

9.1 Finance

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

9.2 Legal

There are no known Legal implications contained within this report.

9.3 Human Resources

There are no known Human Resources implications contained within this report.

9.4 **Equalities**

Equalities

(a) Has an Equality Impact Assessment been carried out?

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

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report’s recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report’s recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
X	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

	YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.
X	NO

9.5 **Repopulation**

The regeneration works outlined in this report should contribute to retaining and increasing the population within the area. There are no repopulation implications contained within this report.

10.0 CONSULTATIONS

10.1 None.

11.0 BACKGROUND PAPERS

11.1 None.

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education, Communities & Organisational Development	Report No:	EDUCOM/21/22/RB
Contact Officer:	Michael Roach	Contact No:	01475 712748
Subject:	Education Update Report – Overview of National and Local Initiatives		

1.0 PURPOSE

- 1.1 The purpose of this report is to give pertinent updates to the Education part of the Education and Communities Committee on national and local projects and issues linked to education.

2.0 SUMMARY

- 2.1 This report contains updates on the following:

2.2 COVID-19 updates:

- Return to school guidance update
- Latest update from SQA
- Digital Strategy Update

Early years updates:

- Update on inspection of Happitots Greenock and Inverkip
- West College Scotland Nursery update
- Governance of Funded Providers

Election of parental and teacher representatives to the Education and Communities Committee.

3.0 RECOMMENDATIONS

- 3.1 The Education and Communities Committee is asked to note the updates contained within this report.

Ruth Binks
Corporate Director
Education, Communities & Organisational Development

4.0 COVID-19 UPDATES

4.1 Return to school guidance update

The guidance for return to schools and early year's establishments was further updated on 1 February 2022. The latest version can be found at this link:

<https://www.gov.scot/publications/coronavirus-covid-19-guidance-on-reducing-the-risks-in-schools/pages/overview/>

Attendance

Inverclyde schools remain broadly in line with the overall national average. More data on this can be found here:

<https://public.tableau.com/app/profile/sg.eas.learninganalysis/viz/COVID19-SchoolsandChildcareInformationAugust2021/Introduction>

Staff absence remains an ongoing challenge and despite changes to earlier return to work from periods of isolation being possible after the 6th and 7th day schools continue to have staff isolating due to having COVID. This means that any additional staff in schools such as recovery teachers are being used to cover staff absences.

4.2 Scottish Qualifications Authority (SQA) update

Schools have now completed their preliminary assessments. Focus is now on completion of courses, revision and examination preparation. All schools are offering after school study support and this is supplemented by national after school study support provided by e-Sgoil which pupils can access through the Glow account. Schools are planning to offer supported study over the Easter holiday – government funding has been announced to support this.

On Tuesday 1 February, SQA announced the move to Scenario 2 of the contingency plans for exams. Scenario 2 will involve publishing some revision support for learners to help them with their revision during the final run up to their exams. Exams will still take place and there will be no further modifications to the exam paper other than those already announced. An overview of the modifications that have already been made and the revision support that will now be made available can be viewed here: <https://www.sqa.org.uk/sqa/100366.html>. The supports for all courses will be published by 7 March 2022.

SQA also announced three services to support learners for the 2022 exam diet:

- **Exam exceptional circumstances service (available while exams are taking place)** – this service is available for learners who are unable to attend an exam due to a reason beyond their control.
- **Grading (takes place once exams have been sat and marked)** – in recognition of the disruption that learners have faced over the last two years, and the different approaches to assessment, this year we are prepared to be more generous in our approach to grading than in a normal year to factor in the impact of the pandemic on learners. This is in line with the approach being taken across the rest of the UK.
- **Appeals service 2022 (after results have been published)** – available for learners who want to question their SQA results. In 2022, all learners will continue to have free direct access to the appeals service and a priority service will also be available for those applying to university, college, training or employment.

The full details of the announcement from 1 February can be viewed here:

<https://www.sqa.org.uk/sqa/100512.html>

4.3 Digital Strategy Update

We continue to make good progress with our digital strategy. Currently good progress is

being made with the installation of the new interactive panels in schools with positive feedback being received on the difference they have already made. The work to improve Wi-Fi coverage and connectivity across most of our schools was completed around the Christmas holidays.

We gave out 1,140 laptops to secondary school students in session 2020/21 from government grants during the first lockdown. Around 80 of these have been returned by pupils who left school in June 2021 and have been processed for reallocation in 2021/22. Since April 2021, our community learning and development service (CLD) distributed around 170 devices to identified P4-7 pupils and this figure includes devices donated by the charitable arm of a national newspaper with the rest funded by other government grants. A further 650 laptops have been purchased for schools and are currently being distributed this year.

Further news about the government's plans for devices for pupils are still to be confirmed.

A recent announcement has been made regarding funding to support the teaching of computing. Backed by up to £1.3 million from the Scottish government, secondary schools can bid for grants of up to £3,000 to purchase additional computing science equipment, devices, software or teaching resources. The investment is in response to the 2020 independent Scottish Technology Ecosystem Review, which recommended increased funding to improve computing science provision in schools.

Every school will also receive two class sets of pocket-sized computers that introduce students to how software and hardware work together.

5.0 EARLY YEARS UPDATES

5.1 Happitots Greenock and Inverkip Update

Inspections by the Care Inspectorate of Happitots (Greenock) and Happitots (Inverkip) in 2021 resulted in both settings failing to meet Scottish Government's national standard and Inverclyde Council's contract.

Officers from Education Services have continued to provide support and challenge although visits have been restricted due to COVID outbreaks in both settings.

There is some evidence of progress in both settings. Action to date includes:

- New management structures in place;
- Increased support from Thrive Childcare national team;
- Improvements to the fabric of the buildings and a commitment to purchasing new resources;
- Plan in place for professional learning for managers and staff.

Officers are continuously monitoring the situation and are due to meet with the operational manager of Thrive Childcare to address ongoing issues.

Officers will continue to monitor progress during the improvement period which ends in November 2022.

Happitots' current contracts to provide funded Early Learning and Childcare (ELC) finish in July 2022. In line with Scottish Government guidance both nurseries will receive a fixed term contract from August 2022 until the end of the improvement period in November 2022. Compliance with the Scottish Government's national standard and Inverclyde Council's contract will be assessed at this time.

5.2 West College Scotland Nursery

West College Scotland nursery is located in the Finnart Campus in Greenock. The service is registered to provide 48 Early Learning and Childcare (ELC) places. It provides childcare for students and is contracted by Inverclyde Council to provide ELC places for children in the community.

On 15 December 2021 Education Services was informed that a decision has been taken to close the nursery on 17 June 2022. This decision is still subject to consultation.

Currently 23 children receive their ELC entitlement in West College Nursery. 13 of this cohort will move on to school and will therefore not be affected by the closure. 10 of this cohort are ante pre-school and will need to transfer to an alternative nursery for their pre-school year. Education Service's Officers are currently engaging with parents to identify alternative placements.

Further scoping of alternative provision, to ensure Inverclyde Council meets its duty to provide Early Learning and Childcare to eligible children, is progressing. As children who attend the West College Scotland nursery come from the wider Inverclyde area options being considered include increasing capacity in local authority settings and funded providers; engaging with potential new Providers and increasing the number of shared places. The continued use of the West College Scotland accommodation is also being explored; however this may not be a viable option as:

- it is unlikely that Care Inspectorate would register this service for a new Provider as the accommodation does not meet current legislation in relation to ventilation, outdoor space and personal care facilities.
- A standalone nursery may not be financially viable due to the limited demand in the area for placements.

5.3 Governance of Funded Providers

As part of the Council's approved framework, reports for relevant organisations are presented to the relevant Service Committee each year giving updates and assurances in terms of performance and governance.

This update refers to Early Learning and Childcare (ELC) providers in the private, voluntary and independent sectors namely Battery Park Nursery, Duchal Nursery Happitots Nursery (Greenock and Inverkip), Madeira Nursery, St. Columba's School Early Years (Kilmacolm), Wellington Children's Centre (Greenock and Gourock) and West College Scotland.

In line with the framework two annual governance meetings have taken place, required information including annual accounts, board / management meetings, business continuity plan) has been submitted and reviewed.

There are concerns around the performance of Happitots (Greenock and Inverkip). This issue has been reported to Committee previously and an update is provided in paragraph 5.1 of this report.

West College Scotland has advised Education Services of its decision to consult on the closure of the nursery in June 2022. This notice period is in line with their contractual obligation. This issue has previously been reported to Committee and an update is provided in paragraph 5.3 of this report.

The Education and Communities Committee is asked to note the current status of ongoing governance arrangements and updates.

6.0 ELECTION OF PARENTAL AND TEACHER REPRESENTATIVES

6.1 There are separate Schemes of Arrangement, which have been approved by the Council, in relation to the election of a parent representative and a teacher representative. In terms of both Schemes of Arrangement the elections for a parent representative and a teacher

representative require to be held following the elections to Inverclyde Council. Both representatives will remain as a member of the Education Committee until the final meeting of the Council prior to the elections.

Accordingly, the tenure of both Ms Anna McMillan, as parent representative, and Ms Paula McEwan, as teacher representative for the Committee will end after the last full meeting of the Council prior to the elections in May 2022, and the March 2022 Education Committee will be their final scheduled meeting. Both Ms McMillan and Ms McEwan have been valued members of the Committee and have brought valuable insight to discussions. Ms McMillan has very helpfully provided an update to the Chairs of parent councils on pertinent Committee business and Ms McEwan has been a link between the Committee and the teaching workforce through the LNCT.

7.0 IMPLICATIONS

7.1 None

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

7.2 Legal

None.

7.3 Human Resources

None.

7.4 Equalities

Equalities

- (a) Has an Equality Impact Assessment been carried out?

<input type="checkbox"/>	YES
<input checked="" type="checkbox"/>	NO – This report does not introduce a new policy, function or strategy or recommend a substantive change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required

- (b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

	YES
✓	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

	YES
✓	NO

7.5 Repopulation

N/A.

8.0 CONSULTATIONS

8.1 N/A.

9.0 BACKGROUND PAPERS

9.1 N/A.

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education, Communities and Organisational Development	Report No:	EDUCOM/23/22/MR
Contact Officer:	Michael Roach, Head of Education	Contact No:	01475 712824
Subject:	Scottish Attainment Challenge Refresh Year 1 Plan 2022/23		

1.0 PURPOSE

- 1.1 The purpose of this report is to update Committee on the SAC Year 1 Plan – Session 2022/23, to seek approval for the tender for the provision of Family Support Worker service and to seek approval for the use of a 60% Quality and 40% Cost of Service weighting in the forthcoming tender for the Provision of a Family Support Worker service and therefore suspending Contract Standing Order 13.2.

2.0 SUMMARY

- 2.1 The current SAC project in Inverclyde has had a focus on both sustainability and an ‘exit strategy’ throughout its existence, being established in 2015. This current Project Manager along with partners and stakeholders, who are already part of an overarching reference group that has been in place since 2015, have created a project plan for year 1 (attached as Appendix 1) indicating the actions required to continue to close the poverty related attainment gap. Whilst further detail from the Scottish Government is awaited, Appendix 2 gives an overview of how the financial and HR position can be managed going forward. This could well be subject to change, depending on other available funding sources.
- 2.2 The Family Support Worker Service, which is currently provided by Barnardo’s and employs 12 staff, expires on 31 March 2022. A Direct Award to extend the current contract to 30 June, 2022 has been approved by the Head of Legal & Democratic Services, Procurement Manager and Interim Director, Finance & Corporate Governance. Additionally the report seeks the approval of Committee to grant delegated authority to the Head of Legal & Democratic Services to accept the tender commencing July, 2022, subject to the SAC plan being approved. This contract will be for a period of two years with the option to extend for a further 12 month period (1st July 2022 until 30th June 2024 with an option to extend for a further 12 months until 30th June 2025).
- 2.3 The tender for the Provision of a Family Support Worker Service is currently being prepared. As in all cases with working with vulnerable families and children, the quality of the service is of paramount importance. In the light of this, we seek the approval of Committee that the Provision of a Family Support Worker Service contract is awarded on a 60% Quality and 40% Cost of Service weighting split to help ensure the required quality of service and best value cost of service can be procured. This is a reversal of the weighting split in the Contract Standing Order 13.2.

3.0 RECOMMENDATIONS

- 3.1 The Education and Communities Committee is asked to note and agree to the contents within this report including the SAC Year 1 Plan – Session 2022/23.
- 3.2 The Education and Communities Committee is asked to note the Direct Award for the extension of the Family Support Worker Service from 1 April- 30 June, 2022.
- 3.3 The Education and Communities Committee is asked to agree that delegated authority be granted to the Head of Legal and Democratic Services to accept tenders for the Provision of a Family Support Worker Service for the period July, 2022 to 30 June, 2024 with an option to extend for a further 12 months thereafter.
- 3.4 The Education and Communities Committee approves the use of a 60% Quality and 40% Cost of Service weighting in the forthcoming tender for Provision of a Family Support Worker Service.

Ruth Binks
Corporate Director Education, Communities
and Organisational Development

4.0 BACKGROUND

- 4.1 This report contains the relevant updates linked to the Scottish Attainment Challenge refresh and the ongoing recovery for education services after COVID19.
- 4.2 The Cabinet Secretary set out in Parliament on 23 November her plans for the next phase of the Scottish Attainment Challenge (SAC), developed in consultation with local government and agreed by COSLA Leaders.
- 4.3 This next phase of the SAC builds on the evidence set out in the Scottish Government and Education Scotland [5 year report](#) on progress towards closing the poverty related attainment gap, the [Equity Audit](#), the [Audit Scotland report](#) on educational outcomes, and the [OECD review](#).
- 4.4 In summary the plans are that with the support of £1 billion over this parliamentary term, the refreshed Scottish Attainment Challenge programme, from 2022/23, will see:
- a broader recognition of children and young people's achievements and attainment,
 - continued empowerment of school leaders through Pupil Equity Funding,
 - a clearer and funded strategic role for all local authorities,
 - funding for Pupil Equity Funding and local authorities confirmed over 4 years to enable long term planning
 - continued support for care experienced children and young people, and
 - a clear framework to support recovery and accelerate progress, led by Education Scotland but with clear responsibilities for all parts of the education system which will enable a clearer line of sight right through the system on the impact of local approaches.

4.5 Delivery model

The provision of PEF will continue in 2022/23, distributing funding to schools (via local authorities, as is currently the case) and empowering headteachers to take local decisions on approaches to tackling the poverty related attainment gap in their local contexts. These decisions will be taken within the above-mentioned framework for recovery and accelerating progress. With c. £130 million to be invested, this remains the primary means of distributing funds for local systems to tackle the poverty related attainment gap. PEF allocation will be confirmed in early spring as usual.

- 4.6 Recognising that poverty exists in every local authority area in Scotland, the significant change to the distribution of funding announced by the Cabinet Secretary is to stop the Challenge Authorities (£43m) and Schools' Programmes (£7m) and redistribute that funding across all 32 local authorities (£43m) and further invest in PEF.
- 4.7 In terms of local authority distribution, this responds to Audit Scotland's comments that funding under the current model does not fully capture pupils living in poverty and that the impact of Covid-19 requires us to re-consider how funding is targeted. It further responds to consistent feedback from the system via extensive stakeholder engagement that all 32 local authorities should have a clear and funded role in the Scottish Attainment Challenge, rather than just the 9 Challenge Authorities.
- 4.8 For the Schools' Programme, this was initiated in recognition that there were some school communities outside the 9 Challenge Authorities with high concentrations of poverty based on SIMD. The subsequent introduction of PEF and its rising costs mean that issuing two separate funding streams to schools is a duplication and by absorbing Schools' Programme funding into PEF, this funding will better support all pupils who need it through a streamlined

approach to both local authority and school level distribution.

- 4.9 The allocations for Inverclyde are set out below and have been determined using Children in Low Income Families data, which directly measures household income thereby providing a precise count of deprived children in each local authority. This will see our SAC funding being tapered back over the next 4 years.

Year	SAC funding allocation
2021/22	£3,467,107
2022/23	£2,748,713
2023/24	£2,030,319
2024/25	£1,311,926
2025/26	£593,532

- 4.10 The existing funding for Care Experienced Children and Young People will continue, demonstrating the Government's ongoing commitment to supporting this cohort of pupils and keeping the Promise. Allocations for this funding stream will be confirmed by the summer in 2022 as usual.

The Scottish Government will continue to invest in a number of national programmes and will be developing further plans for this before April 2022.

5.0 Next steps and planning for the SAC refresh

- 5.1 From April 2022 Inverclyde will begin to implement a revised / refreshed model of the existing SAC project. The project plan for the first year is attached as Appendix 1 to this report.
- 5.2 In response to the confirmation of the above we have established a core group to oversee the planning for the next phase of project and plan for this transition to be as smooth as possible. The SAC Refresh core group has discussed the Year 1 Plan.
- 5.3 We have completed a consultation exercise with all stakeholders.
- 5.4 The Scottish Government will launch the SAC Refresh programme in late March 2022 where the "Framework for Recovery and Equity" guidance will be issued. We will use the Framework to guide us in our future planning. The Scottish Government are expecting the Year 1 plan to be submitted before the end of June 2022.
- 5.5 The SAC Refresh Year 1 programme will continue to use the existing workstreams to address the poverty related attainment gap within Inverclyde.
- Building Capacity
 - Families and Communities
 - Literacy and Numeracy
 - Health & Wellbeing and Nurture
 - Digital
- 5.6 The Project Lead will effectively manage the overall programme ensuring impact from each workstream. Each workstream will have outcomes which will be measurable and will be reported on bi-annually to the Scottish Government. The overall aim of the SAC Refresh programme will be to continue to close the poverty related attainment gap while simultaneously ensuring a sustainable model remains impacting positively on pupils, families and staff across Inverclyde.
- 5.7 The phasing of the reduction in funding over four years will have human resources implications for the Council and also partner organisations. Appendix 2 shows how this can be managed over the period. This projection is very much indicative and depends on how other funding sources or projects progress and the timing of these.

5.8 Family Support Worker Service

The Family Support Worker service expires on 31 March 2022 and to ensure continuity of service, while a new tender exercise is being developed, approval for a Direct Award has been sought from the Procurement Manager, Head of Legal and Chief Financial Officer. The Scottish Attainment Challenge (SAC) funding was approved in November leaving insufficient time for the plan to be complete and approved at committee and a procurement exercise to be run. This direct award will ensure continuity of service from 1st April 2022 until 30th June 2022 with a formal contract put in place for 1st July 2022 subject to the outcome of a new tender exercise. Based on the current contract rates, the estimated value of the Direct Award will be approximately £141,500.

5.9 The Family Support Worker service expires on 31 March 2022 and approval is being sought to proceed to a tendering process whereby a continued Family Support Work service can continue to support families over a 2 year period – SAC Refresh Year 1 and 2. The Family Support Worker service employs 12 staff who work directly with targeted families requiring bespoke support.

6.0 PROPOSALS

6.1 Finance

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

6.2 Legal

N/A.

6.3 Human Resources

Over the next 4 years of the SAC Programme staffing will be impacted as reduced funding will mean a reduction in staffing. Consideration being given to the impact a reduced service via the SAC refresh plan will have on existing staff working as part of the current SAC project. At this stage impact on employment rights can be contained within annual staffing process.

6.4 Equalities

Equalities

(a) Has an Equality Impact Assessment been carried out?

<input type="checkbox"/>	YES
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NO – This report does not introduce a new policy, function or strategy or recommend a substantive change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.

NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.

NO

6.5 Repopulation

N/A.

7.0 CONSULTATIONS

7.1 N/A.

8.0 BACKGROUND PAPERS

8.1 SAC Year 1 Plan - Session 2022/23.

Scottish Attainment Challenge (SAC) Refresh Programme – Session 22/23 – 25/26

Year 1 Plan

Multi-Year Reducing Budget			
2022/23	2023/24	2024/25	2025/26
£2,748,713	£2,030,319	£1,311,926	£593,532
Rationale:			
<p>To effectively plan a smooth transition from SAC 1 to SAC Refresh, ensuring the original principles of the Attainment Challenge Scotland fund are adhered to. To continue to close the poverty related attainment gap through accessing and interrogating robust data sets and utilising the evidence-based interventions that we know work, alongside effectively deploying resources to meet the needs of the pupils, families and staff across Inverclyde. Through building sustainable models and effective partnership working, we will be able to continue to close the poverty related attainment gap, while capacity in resources is reduced, resulting in improved outcomes for pupils, families and communities.</p>			
Key Outcomes over the 4 Year Programme			
<ul style="list-style-type: none"> • To plan effectively for transition from SAC 1 to SAC Refresh • To continue to close the Poverty Related Attainment Gap – Literacy/Numeracy • To work towards a sustainable model of targeting CLIF (<i>Children In Low Income families</i>) and providing positive outcomes for them and their families, celebrating pupil achievements • To improve quality in Learning, Teaching and Assessment • To increase capacity in all establishments and for all staff in the delivery of evidence-based interventions through the provision of quality CLPL (<i>Career-Long Professional Learning</i>) • To support improvements in mental HWB (<i>Health & Well-being</i>) of pupils, families and staff • To effectively engage with partners to support outcomes for families in our communities • To improve Digital inequity across the Local Authority 			

Key Measures for the 4 Year Programme – NIF Stretch Aims + Locally Agreed Stretch Aims to address current barriers

Specific targets to be agreed with Scottish Government by June 2022 – i.e. percentage increases (Year on Year)

- The Poverty Related Attainment Gap has closed significantly while attainment continues to rise for all
- Improved attendance of all pupils, particularly those identified as CLIF year on year
- Improved ability for pupils to self-regulate through targeted support by trained staff
- Improved quality of Teaching & Learning leading to gains in attainment across Literacy/Numeracy/H & Wb
- Sustainable approaches to CLPL ensuring impact on practice
- Increased parental engagement in Family Learning leading to improved relationship between children and families
- Increased leadership capacity focusing on Data analysis and impact of evidenced based interventions
- Increased collaboration from establishments focusing on using PEF (*Pupil Equity Fund*) to improve outcomes for pupils and families

Opportunities:

- To review the Service Delivery Model to provide a clear Year on Year plan, with built in flexibility, to meet the needs of pupils, families and communities across Inverclyde
- To increase sustainability approaches to support long term impact on closing the poverty related attainment gap
- To increase the capacity of quality first teaching and learning within establishments
- To ensure sustainability through evidence-based interventions being embedded in staff practice
- To continue to evolve the use of robust data to support effective decision-making
- To increase collaboration across establishments and partners resulting in improved outcomes for targeted pupils and families
- To increase capacity in establishments to deliver quality interventions leading to increased attainment in Literacy & Numeracy –
- To support establishments in sustaining quality CLPL opportunities via a digital approach
- To support establishments to better plan for PEF and implement interventions that will have direct impact on addressing the poverty related attainment gap
- To work collaboratively with partners out-with the Local Authority to access good practice
- To access additional funding streams linked to Family Wellbeing and Digital Access

Sustainability:

Year 1:

Workstream	Sustainable Approaches	Possible staffing Implications	Potential Solutions
Capacity Building	Continued evolution of the Dashboard and Data Packs to make them self-sustaining	<ul style="list-style-type: none"> • NA 	<ul style="list-style-type: none"> • N/A
Families & Communities	Access to wider funds from Scottish Govt over the next 4 years	<ul style="list-style-type: none"> • If tender successful then no impact on staffing for Years 1 & 2 relating to Family Support Workers 	<ul style="list-style-type: none"> • Provider accesses the Family Wellbeing Fund - £5,000,000 across the next 4 years to support the Family Support worker intervention
Literacy & Numeracy	<p>CLPL recorded content of Evidence-based interventions for establishments and families to use at a time and place that suits their context</p> <p>Continued upskilling of staff across Inverclyde in the delivery of quality first teaching and learning impacting positively on Attainment and Achievement data</p>	<ul style="list-style-type: none"> • Reduction of Outreach Staff • Vacant CMO Secondary to remain unfilled 	<ul style="list-style-type: none"> • Transfer of Permanent Outreach Staff (2 staff) to Recovery Posts to deliver same evidence-based interventions resulting in no duplication and more strategic impact • Remaining staff would be supported via Education staffing exercise • Current Literacy/Numeracy CMOs would fill the remit of vacant position
Health & Wellbeing & Nurture	Effective use of CMO (HWB/Nurture) to support and provide quality CLPL –	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • N/A

	<p>Recorded for future use by establishments and families at a time that suits their context</p> <p>Continued delivery of the Nurture programme supporting targeted pupils</p> <p>Continued engagement with IEPs to upskill staff across Inverclyde in trauma informed practices</p> <p>Digital Strategy in place and implementation ongoing throughout Year 1</p>			
Digital		<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • N/A 	

- **Years 2 – 4 to be completed based on yearly SAC report to Scottish Government and progress made against national and locally agreed stretch aims.**

Summary:

Through effective consultation with stakeholders and a continued focus on the National Improvement Framework (NIF) and locally agreed stretch aims, the plan for **Year 1** of the SAC Refresh within Inverclyde will continue to deliver quality supports and interventions to continue to close the poverty related attainment gap. Impact on staffing will be mitigated with effective budgetary planning through the multi-year funding model available and continued engagement and support from Education Senior Managers and HR.

Potential Funding Opportunities:

- Family Wellbeing Fund
- Additional Funding to CLD via Scottish Govt
- Funding from HSCP ~ Family Support Workers

Risks:

- Reduced Staffing – leading to reduced capacity
- Interventions becoming unsustainable and ceasing
- Partners unable to access additional funding to continue with interventions

Governance:

- Governance Group meeting – 1 X per month –
- ACHT Meeting (*Attainment Challenge Head Teacher Meetings*) Primary & Secondary – 1 X per term
- Partners Group Meeting (*All partners included*) – 1 X per Term
- PLC Meeting (*Professional Learning Community HTs*) – 1 X per Term
- ACIG Meeting (*Attainment Challenge Implementation Group*) – 1 X per term
- Reports to Education Committee – as required
- Bi-annual Reporting to the Scottish Government
- Tri-annual Reporting from Partners feeding into the Bi-annual

Process for Change:			
Action	Timescale	Outcome	Complete
Initial Planning Dialogue	December 2021 – January 2022	Year 1 Plan drafted and initial thoughts re implications on impact and staffing issues	✓
Consultation Period	7 – 31 January 2022	Key focus groups engaged in dialogue – best outcomes for project – feedback gathered in final part of consultation	✓
Draft Years 1 – 4 Plan shared with Governance Group – caveat that plan will need to be amended based on locally agreed stretch aims	4 February 2022	Year 1 Plan shared and challenge invited – possible risks/threats identified/solutions identified/process agreed	✓
Year 1 Plan shared with Education Committee	March 2022	Year 1	
Year 1 Plan shared with all stakeholders and identified groups impacted by decision to exit	March 2022	HoE – ELC/Primary	
Further dates to be added -	June 2022	Clarity of Plan to be outlined for Scottish Government – Progress with current plan will impact the new plan – Stretch Aims, etc...	

SAC Year 1 Session 22/23

Year	Budget	W/s	Outcomes (Targets)	Measures: Local Stretch Aims	How to deliver? (TEAM)
22/23	£2,748,713	BC	<ol style="list-style-type: none"> Enhanced evaluation of impact of outcomes and measures of each intervention Enhanced collaboration between target schools (12 SAC Schools) Increased sharing of practice across all Inverclyde schools – PEF event to support effective planning (Linked to PEF Planning) Progress made in a smooth transition to SAC Refresh when details are available 	<p>Measures: Local Stretch Aims</p> <ol style="list-style-type: none"> All partners to undertake quality CLPL and embed evaluative Report Writing in their practice – this is evidenced in the termly reports submitted to the Project Lead which at least 80% be evaluated as good or above 12 SAC schools will demonstrate evidence of collaborating on raising attainment through engaging in quality professional dialogue in trios focusing on systems and processes of quality assurance Effective planning and use of PEF to identify and address key gaps Action Plan created to address local stretch aims and funding allocated to appropriate workstreams Partners identified and targets agreed for session 2022/23 	<ul style="list-style-type: none"> Project Lead Admin Team SEEMiS Officer Data Officer 4 x RAs + backfill 0.4FTE
		FC	<ol style="list-style-type: none"> Increase in 'readiness to learn' of targeted pupils whose family receives bespoke services (XXXX%) Target to be agreed with Scottish Government by June 2022 Increased number of parents improving their mental health through targeted interventions (XXXX%) Target to be agreed with Scottish Government by June 2022 	<ol style="list-style-type: none"> Baseline audit of families who receive bespoke services (Numbers) 	<ul style="list-style-type: none"> Provider of the family Support Workers Team CLD

		<p>3. Increase in positive child parent/carer relationships and family functioning of targeted families because of bespoke interventions</p> <p>4. Decrease in number of families needing crisis support from Barnardo's (Current Service Provider) due to early intervention (XXXX%) Target to be agreed with Scottish Government by June 2022</p>		
<p>HWB</p>	<p>1. Increase in the number of schools who implement a whole school nurture approach based on the Education Scotland Applying Nurture as a Whole School Approach (2017) document and using the adapted Inverclyde implementation model</p> <p>2. Increase in the number of nurture teachers upskilled to drive the change in their schools and promote nurture principles at a whole school level and sustainable support for AC schools through membership of implementation teams</p> <p>3. Increase in the number of nurture principles schools are embedding from 'Applying Nurture at the Whole School Level'</p> <p>4. Increase in staff recognition of the link between development and relationships, and 'behaviour as communication'</p>	<ul style="list-style-type: none"> • 27-30 month review (Children showing no concerns across all domains • HWB: Children total difficulties score (age 4-12) • HWB: Children total difficulties score (age 13 & 15) • 	<ul style="list-style-type: none"> • CMO – Nurture/HWB (Primary) • CMO – HWB (Secondary) • Nurture Teacher Support within establishments (0.8FTE) • Play Therapist • Ed Psych – CLPL offers • Research Asst to evidence case studies in interventions 	

		<p>5. Increase in the number of teachers' who have an understanding of attachment theory and strategies</p> <p>6. Increased engagement in learning.</p> <p>7. Improved attendance of targeted learners. (XXXX%) Target to be agreed with Scottish Government by June 2022</p> <p>8. Increase in self-regulation of targeted learners. (XXXX%) Target to be agreed with Scottish Government by June 2022</p> <p>9. Improved peer relationships of targeted learners.</p>		
	L & N	<p>1. Enhanced leadership of recovery and targeted intervention systems through modelling and challenge from and for leaders, which build foundations for sustainable challenge and support networks (RAs Evaluations/Impact)</p> <p>2. Increased capacity of primary head teachers to work collaboratively to support recovery and beyond</p> <p>3. Target groups of learners (SIMD 1 and 2 and low TJ scores) in primary schools' attainment will be recovered to anticipated pre pandemic levels or beyond in literacy and numeracy (XXXX%) Target to be agreed with Scottish Government by June 2022</p> <p>4. Targeted learners (SIMD 1 and 2 and low TJ scores) in secondary pupils in the BGE</p>	<ul style="list-style-type: none"> • Primary – Literacy (P1, P4, P7 combined) • Secondary Literacy (S3, 3rd level or better) • Primary – Numeracy (P1, P4, P7 combined) • Secondary Numeracy (S3, 3rd level or better) • SCQF 4 or above (1 or more on leaving school) • SCQF 5 or above (1 or more on leaving school) • SCQF 6 or above (1 or more on leaving school) • Participation measure 	<ul style="list-style-type: none"> • CMO – Literacy (Early/First) • CMO – Literacy (Second/Third) • CMO – Numeracy (Early/First) • CMO – Numeracy (Second/Third) • Secondary Teachers supporting improvements in Literacy & Numeracy Outreach Teachers X • 5FTE • Librarian • Sp & Lang Therapist (SLT)

		Digital	<p>attainment will be recovered to pre pandemic anticipated levels or beyond, in particular in literacy and numeracy (XXXX%) Target to be agreed with Scottish Government by June 2022</p> <p>5. Increased Pupil Support Assistants' capacity to provide effective provision that improves learning opportunities for pupils (PSA Training Data)</p> <p>1. Digital inequity will be reduced for learners needing access or hardware to support learning at home (Device Deployment/WIFI/Connectivity)</p> <p>2. Improvements in teaching and learning through the development of digital learning pedagogy that enhances learning in the classroom using digital technology (Pedagogy)</p> <p>3. Increase in the number of schools/practitioners using digital resources to support quality learning (CLPL)</p> <p>4. Increased capacity of staff to deliver digital literacy in classrooms through digital pedagogy (CLPL)</p> <p>5. Increase in the number of parents able to support their child with digital learning (Parental Engagement in family learning)</p>	<ul style="list-style-type: none"> • Locally Agreed Stretch Aims here re addressing Digital Inequity 	<ul style="list-style-type: none"> • Digital Strategy Lead Officer • CMO – Digital Literacy/Pedagogy
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Appendix 2 – SAC Refresh

Sustainability:

Throughout the 4 year programme sustainability has been carefully thought through as we embed practice across all interventions. Careful consideration has been given to the timely exiting of various staff and partners as we continue to provide the quality services required to continue to close the poverty related attainment gap. Consideration has also been given to the potential for accessing alternative funding streams that will become available. The draft plans detailed below will be subject to change as we progress year on year.

Year 1 – Session 2022/23	Team Required		Team Exiting	
Fund = £2,748,713	Non-Teaching	Teaching	Non-Teaching	Teaching
	28	29.0 FTE	0.2 (1 Day)	4.0 FTE
<p>Broad Outline: We will maintain all interventions that we currently deliver with only a minor reduction in the Literacy and Numeracy intervention. This will be transferred to Recovery Teacher delivery.</p>				

Year 2 – Session 2023/24	Team Required		Team Exiting	
Fund = £2,030,319	Non-Teaching	Teaching	Non-Teaching	Teaching
	19	13.4 FTE	9	15.6 FTE
<p>Broad Outline: Services maintained will continue to deliver quality interventions to continue to close the poverty related attainment gap such as Family Support Worker Service/Family Learning /Literacy & Numeracy support and Data support for establishments. A reduction in the delivery of some Literacy & Numeracy interventions will be maintained through the annual staffing exercise and the upskilling of establishment staff. Interventions delivered by partners will be transferred to establishments as these will be embedded in practice</p>				

Year 3 – Session 2024/25		Team Required		Team Exiting	
Fund = £1,311,926	Non-Teaching	Teaching	Non-Teaching	Teaching	
	19	6.0 FTE	0	7.4 FTE	
<p>Broad Outline: A targeted approach of service delivery will provide specific evidence-based interventions - Family Support Worker Service (<i>Optional Year if external funding cannot be accessed</i>)/Literacy & Numeracy support and Data support for establishments.</p> <p>A reduction in Health and Wellbeing intervention will be maintained in establishments as a Play Pedagogical approach will support targeted pupils.</p>					

Year 4 – Session 2025/26		Team Required		Team Exiting	
Fund = £593,532	Non-Teaching	Teaching	Non-Teaching	Teaching	
	2	6.0 FTE	17	0	
<p>Broad Outline: A targeted approach of service delivery will provide specific evidence-based interventions - Literacy & Numeracy support and Data support for establishments. A reduction in the Family Support Worker service and the Family Learning intervention will be maintained via access to external funding.</p>					

Report To: Education & Communities Committee **Date:** 8 March 2022

Report By: Corporate Director Education, Communities & Organisational Development **Report No:** EDUCOM/17/22/LW

Contact Officer: Linda Wilkie **Contact No:** 01475 712812

Subject: Early Learning and Childcare Budget for 2022/23

1.0 PURPOSE

- 1.1 The purpose of this report is to provide Committee with an update on Early Learning and Childcare (ELC) budget for 2022/23.

2.0 SUMMARY

- 2.1 The report details the budget settlement for ELC for 2022/23 and the impact of this on the service. The projection shows that the budget reduction can be primarily achieved through use of the historic underspend and 1140 funding. There have been some minor adjustments to the core budget.
- 2.2 Indications are that the ELC Specific Grant will cease, potentially as soon as 2023/24 and, whilst this gives the Council greater flexibility on how much to allocate to ELC, all inflationary pressures currently met from within the Specific Grant for employees and partners will require to be met from the corporate budget.

3.0 RECOMMENDATION

- 3.1 That the Committee:
- Note the reduction in the ELC budget for 2022/23.
 - Approve the proposals for the 2022/23 budget.
 - Note that this provides a solution for 2022/23 only and that unless ELC funding increases in future years, inflationary pressures will add to the overall budget gap.

Ruth Binks
Corporate Director
Education, Communities & Organisational Development

4.0 BACKGROUND

- 4.1 Inverclyde Council submitted its expansion plan to Scottish Government in March 2018. The plan provided details of current services and the developments required to deliver 1140 hours. Since this time the plan has been subject to change in line with local need and the timeline for infrastructure developments.
- 4.2 Inverclyde Council has received specific revenue grant funding from Scottish Government since 2018. This funding has increased incrementally since this date and is ring fenced to support the roll-out of the 1140 hours expansion. Over the past 2 years there has been a significant underspend in this budget.

5.0 REVENUE BUDGET

- 5.1 Scottish Government has advised that the Early Learning and Childcare (ELC) specific grant will reduce in the next financial year. Although a reduction in funding was anticipated it was thought that this would be on a phased basis.
- 5.2 In financial year 2021/22 the Specific Grant for ELC was £8.705m. For 2022/23 this reduces to £7.598million resulting in a funding reduction of £1.136million.
- 5.3 It should be noted that there has been a historic underspend in the ELC budget. This has been used to support COVID recovery and other initiatives as approved by Scottish Government.

6.0 IMPACT OF BUDGET REDUCTION

- 6.1 A projection of the budget for 2022/23 shows that the reduction can be primarily achieved through the recurrent underspend. In addition, it is proposed to make some minor adjustments to the core budget in order to balance the overall ELC budget for 2022/23.
- 6.2 The following items have been included in the projection:
 - additional cost of the pay award including the national insurance increase;
 - increased payments to Funded Providers. Scottish Government is undertaking a national cost collection exercise for ELC sustainable rates and is likely that the payments to Funded Providers will increase as a result of this exercise. An allowance for an increase has been built in but the actual cost is unknown at this time.
 - The cost of increased capacity in Hillend Children's Centre and changes to the staffing structure in Nursery Classes.
- 6.3 The budget has been balanced by the removal of the historic underspend, deletion of long-term vacant posts, projects naturally finishing and a reduction of resource budgets.
- 6.4 The 2022/23 budget savings proposals of a service delivery change at Kilmacolm Nursery Class and a reduction in the number of Family Support Workers are not required to balance the budget. These can continue to be considered as part of the budget savings exercise.
- 6.5 The detailed proposal is attached as appendix 1.

7.0 IMPLICATIONS

- 7.1 Annually Recurring Costs/ (Savings)

Indications are that the ELC Specific Grant will cease , potentially as soon as 2023/24 and, whilst this gives the Council greater flexibility on how much to allocate to ELC all inflationary pressures for employees and partners currently met by the Specific Grant will require to be met from the corporate budget.

Cost Centre	Budget Heading	With Effect from	Annual Net Impact	Virement From (If Applicable)	Other Comments
Early Years		22/23	£7,598,000		

Legal

7.2 None.

Human Resources

7.3 None.

Equalities

7.4 Equalities

(a) Has an Equality Impact Assessment been carried out?

YES

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

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.

NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

YES

NO

7.5 **Repopulation**

N/A.

Description:	Projected Costs 21/22	Projected Costs 22/23	Comments/Assumptions
Salaries:			
SubTotal	5,074,998	5,711,365	Employee Costs
Other Expenditure - 60161:			
Bespoke Course			
Childminders	107,000	110,000	2021/22 run rate + 3% inflation
Cross Boundary Funding	35,000	35,000	Same as 2021/22
Funded Partner Provision - Nurseries	1,229,000	1,174,000	2021/22 run rate + 5% inflation (West College stopped)
Property Services, utilities, building maintenance & lifecycle			
Hillend Children's Centre & Nursery Development	89,890	-	One-Off expenditure 2021/22 - staff in BuB above
Barnardos	45,000	-	3 months will be funded from EMR then stopped
Resources	70,000	-	One-Off expenditure 2021/22 - stopped
Training and Development	30,000	30,000	2021/22 run rate
Facilities plus Cost of Lunches	521,000	558,000	Per BuB + Pay Increase + £150k Provisions
Modern Apprentices	-	-	No contribution from Early Years
Bus Drivers	-	-	
ASN Taxis	-	-	no expenditure 2021/22
Central Admin - HR	23,600	-	stopped
DMR (Management time to school)	67,140	67,140	DMR Resources budget top up
Clerical Hrs - Education HQ	39,450		Additional hours stopping
Transport			
Other Potential costs		(157,592)	Core Posts P01828 (vacant since 08/21) & 08052 (vacant since 03/20) & £30k Framework Budget
SubTotal	2,257,080	1,816,548	
Total	7,332,078	7,527,913	
Budget 2021/22	8,705,070	7,598,000	
Less	(1,372,992)		Budget vired to EMR
Balance of Budget for 2021/22	7,332,078		
Over/(Under)spend	-	(70,087)	

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education, Communities and Organisational Development	Report No:	EDUCOM/18/22/MR
Contact Officer:	Michael Roach, Head of Education	Contact No:	01475 712824
Subject:	Revised Devolved School Management (DSM) Scheme of Delegation		

1.0 PURPOSE

- 1.1 The purpose of this report is to seek approval from the Education & Communities Committee to implement a revised Devolved School Management (DSM) Scheme.

2.0 SUMMARY

- 2.1 In June 2019, the Scottish Government published updated DSM guidelines, which sought to build on and improve on the DSM arrangements in Local Authorities whilst reflecting the priorities emerging from the Education Reform Joint Agreement of June 2018 such as Leadership, Empowerment, Collaboration and Funding.
- 2.2 Education Services established a working group to consider this revised guidance, and review the existing Scheme of Delegation (SOD), (Appendix 1).
- 2.3 The working group has reviewed the existing SOD against the DSM guidelines in 2.1 and found that no major revisions were required however some aspects have been updated and streamlined. An audit of the revised SOD against the expected and recommended aspects of the guidelines (Appendix 2) has found that we are compliant against all of the expected aspects and have met the majority of the recommended.
- 2.4 The working group has made recommendations about changes to the approach taken to allowing schools to carry forward budget from year to year. The key rationale for this is to further empower Head teachers to have more control over budgets and decisions taken relating to these.
- 2.5 The working group will continue to work together to create further operational guidance for schools to support the implementation of the SOD and review the SOD in April 2023 in order to account for possible changes to staffing structures to accommodate future reduction of the reduction of class contact time of teachers to 21hrs.

3.0 RECOMMENDATIONS

- 3.1 The Education and Communities Committee is asked to approve the implementation of the revised Devolved School Management (DSM) Scheme.

- 3.2 Agree to a further review of the SOD in April 2023 to reflect any changes that may need to be taken into consider in line with future developments around school staffing i.e. the reduction of class contact time of teachers to 21hrs.

Ruth Binks
Corporate Director
Education, Communities and Organisational Development

4.0 Background

- 4.1 Devolved school management was introduced in 1993 to enhance and improve the management of resources at school level. Schools have benefited from the introduction of devolved school management as they have greater control over their budgets which allows them to respond to local needs more effectively.
- 4.2 In June 2017 the Scottish Government consulted on changes to DSM as part of the wider 'Fair Funding to Achieve Excellence and Equity in Education' consultation. In June 2019, the Scottish Government published updated DSM guidelines, which sought to build on and improve on the DSM arrangements in Local Authorities whilst reflecting the priorities emerging from the Education Reform Joint Agreement of June 2018 such as Leadership, Empowerment, Collaboration and Funding:
- <https://www.gov.scot/binaries/content/documents/govscot/publications/advice-and-guidance/2019/06/devolved-school-management-guidelines/documents/devolved-school-management-guidelines/devolved-school-management-guidelines/govscot%3Adocument/devolved-school-management-guidelines.pdf>
- 4.3 Following the publication of the revised DSM guidelines two working groups were established. One was to review the Council's existing DSM scheme with a particular focus on how we might further empower Head teachers in relation to Devolved Management of Resources (DMR). The second was to review approaches to the structures of management teams in secondary schools. The groups consisted of representatives from the Educational Services central team, Schools Finance, Human Resources, Internal Audit and Head Teacher reps from secondary schools.
- 4.4 The DSM group discussed the issues with the existing scheme and bench marked the current approaches with existing and developing schemes in other councils namely North and South Ayrshire with discussions and best practice visits being made to Fife and South Lanarkshire.

5.0 KEY PROPOSALS

- 5.1 In summary the outcome of the group's work and proposals for change include:
- The existing scheme matched well the previous DSM guidance as well as that published as referred to in 5.2.
 - Through benchmarking our existing approach and SOD with those seen in other LAs it was clear that other LAs were moving more towards our existing approach and agreed with our thoughts on what might need to change.
 - The feedback from Head teachers was that the existing approaches with the SOD were empowering and that they did not feel that they didn't have the ability to make decisions about the DMR aspects of their budgets
 - That there was still room to further develop and streamline aspects of how the DMR was managed during the financial year that may ease workload for both schools and the central finance team
 - That a move to reconfigure the approach to carry forwards be built into the SOD – see section 11, paragraphs 3 and 4.

The working group has agreed that they will continue to meet and produce further operational guidance that will support the implementation of the SOD.

6.0 IMPLICATIONS

6.1 Finance

There are no financial implications arising from this report. School DSM budgets reflect the existing SOD and will not increase overall as a result of the revision to this revised SOD.

Schools will continue to have the powers to agree budget virements and carry forwards within the context of the Council's Financial Regulations and DSM guidelines. Carry forward arrangements are a key feature of DSM and will not be restricted by underspends or overspends elsewhere in the Council or Directorate.

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

6.2 Legal

None.

6.3 Human Resources

None.

6.4 Equalities

Equalities

(a) Has an Equality Impact Assessment been carried out?

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

(b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
✓	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

✓

YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.

NO

6.5 Repopulation

N/A.

7.0 CONSULTATIONS

7.1 Consultation with headteachers has taken place.

8.0 BACKGROUND PAPERS

8.1 N/A.

Inverclyde Council
Education Services
Devolved School Management scheme
2022/23

“An empowered system is built on mutual trust, cooperation, transparency and highly effective communication. In an empowered system, headteachers, schools and their Local Authorities are partners, each contributing and supporting each other and respecting the different role each plays.”

DSM Guidelines

1. Introduction

Devolved School Management (DSM) was introduced in 1993 to enhance and improve the management of resources at school level. DSM Guidelines are issued to Local Authorities by Scottish Ministers under Section 13 of the Standards in Scotland's Schools etc Act 2000.

The most recent DSM Guidelines Scottish Government and COSLA Education Reform Joint Agreement of 2018, published in 2019, seek to build and improve on previous guidelines and reflect and integrate with the Education Reform Programme and priorities emerging from the Scottish Government and COSLA Education Reform Joint Agreement of 2018.

The DSM principles, agreed by the Fair Funding Reference Group are:

- Subsidiary and Empowerment
- Collaboration
- Accountability and Responsibility
- Clarity and Equity

These principles reflect the National Improvement Framework aims of excellence through raising attainment and achieving equity. The principles also fully endorse those proposed in the Fair Funding consultation:

- Support excellence and equity – ensuring every child and young person has the same opportunity to succeed
- Be fair – placing the needs of all children and young people at the centre
- Be simple, transparent and predictable – ensuring the costs of delivering education can be easily understood and explained and that schools are able to manage and plan ahead with certainty
- Deliver value for money – ensuring that every penny spent is used effectively

2. Review cycle

It is recommended that Devolved School Management schemes are reviewed every 3 years. This scheme will be reviewed again in April 2023 in order to take into account possible changes to the scheme required due to future changes to staffing as part of increased staffing numbers linked to further reduction of teachers' teaching contact time to 21 hours.

3. Budget Overview

The Council receives the bulk of its funding from the Scottish Government. Scottish Government Total Revenue Funding (TRF) is broken down into 3 constituent parts: General Revenue Grant (GRG), Non-Domestic Rates Income (NDRI) and Specific Grants. The Council sets the budget each year, in February and March. Services must ensure that financial plans align with the mission, vision and priorities within the LOIP and service operational plans. Budgets are aligned to the

delivery of these plans and should be developed accordingly. Budgets are calculated for the various sections within all services including Education.

School budgets for teachers are constructed using actual teachers' salaries; promoted structures are also funded to actual salaries. School budgets for local government staff are constructed using actual salaries.

The method/formula for allocating staff to schools is detailed through LNCT agreements, and against ratios that are required to be in place as well as against the annual classification of primary schools and the agreed curriculum model in Secondary Schools.

The Council participates in the Teacher Induction Scheme (TIS) providing probationer teacher places. These are included in the staffing entitlement with any places in addition to the staffing formula funded by the Scottish Government. Finance will review the funding received from the Scottish Government for TIS on an annual basis and ensure that sufficient funds are transferred to the Education Service to cover salary costs of probationer teachers. See **appendix 1** for a full overview of how staffing is allocated to schools.

4. Best Value Principles

The Best Value framework supports continuous improvement in public services in Scotland and is a key foundation of the Scottish Government Public Sector Reform agenda. As part of this framework the Council must secure continuous improvement whilst maintaining an appropriate balance between quality and cost. This requires a strong financial management framework, supporting strategic financial planning and sitting alongside the performance management framework.

The Corporate Procurement Strategy document and financial regulations set out the recommended activities and procedures required when purchasing all externally provided goods, services and works which Heads of Establishment must adhere to.

5. School Expenditure within Wider Strategic Planning

Heads of Establishment are expected to ensure school expenditure is in accordance with their School Improvement Plan, supporting the Council's strategic plans, priorities and the National Improvement Framework. This includes their role in planning for, implementing and managing the Pupil Equity Funding (PEF) allocated to their school; primary and secondary schools only.

6. The Delegated Management of Resources (DMR) Scheme in Summary

Delegated Management of Resources (DMR) devolves to establishment level, with appropriate support, a measure of decision making power over the way in which spending is carried out within budget lines and over the way in which financial resources are distributed among specific budget heads within a school's overall cash allocation.

Heads of establishment and schools are provided with the autonomy and flexibility to make the most effective use of resources which best suit local circumstances.

It is based on a foundation of partnership between the Authority and establishments with each partner taking responsibility for managing their resources within the wider context of the authority supporting and enabling establishments to optimize their decision making, and facilitating schools' decisions in terms of the educational outcomes they achieve.

A carry forward facility in relation to surpluses and deficits is available from one financial year to the next. Savings made in one area can be spent on another aspect of provision, judged to best contribute to the education of pupils and deemed to be more important by the establishment, while taking best value into consideration.

The power is delegated to Head teachers but the criteria is owned by all concerned i.e. establishments, parents, Parent Councils and elected members.

Safeguards are built into the scheme. Minimum standards to be maintained in each budget area are laid down centrally. These protect for example the staffing standards on the basic number of staff who must be employed, and agreed staff conditions of service.

Funds are held centrally to allow the provision of high quality external services such as the Education Quality Improvement Service and Education Psychological Services. These services are available to all schools, deployed according to need.

Central resources are also used to provide cover for schools facing emergencies or unforeseen circumstances which arise during the course of a year.

The DMR initiative is founded within the protection of a supportive education authority which provides a strategic planning framework while being committed to a community development model of service provision.

The DMR scheme aims to:

- optimise decision making in response to local needs
- facilitate school decisions in terms of educational outcomes
- match resources to policy implementation in local circumstances to promote greater accountability and management responsibility to increase efficiency and effectiveness
- enhance the quality of education

Monitoring and evaluation of the operation of DMR has established that the local flexibility to deploy funds within a school's budget has variously:

- improved schools' capability to implement development plans
- increased the availability of teaching and learning materials
- funded the provision of additional staff
- enhanced the educational environment in schools

7. The Role of the Education Authority

The education authority has a key role in relation to establishments under DMR through planning strategically and setting policy objectives

- Determining initial budget allocations
- Providing budget stability
- Directing the capital programme
- Supporting DMR operations at school level
- Encouraging responsible use of the flexibility attached to virement, 3 year budgeting and carry forwards
- Allowing Heads of Establishment to take corporate responsibility for Council wide school budget issues
- Empowering schools thereby enabling them to deliver policy priorities
- Deploying high quality central support services cost effectively
- Offering realistic protection to individual schools against emergencies and unforeseen changes in circumstances
- Giving access to the economies of scale in bulk purchasing power
- Encouraging co-operation to achieve common goals
- Monitoring school performance
- Monitoring and assisting establishments in respect of their adherence to the key principles of DMR
- Ensuring democratic accountability for the operation of the education service

8. The support on offer to establishments

Each establishment has access to an administrative and budgeting system linked to a network covering establishments and education offices.

In addition to DMR clerical hours at establishments, wider support is organised on a cluster basis.

Clusters vary in the number of establishments but generally comprise of a secondary school, various primary schools, any special school located within the area and early years' establishments.

Each cluster has a full time School Business Officer (SBO) who monitors all aspects of the budget and provides Heads of Establishments with advice on day to day DMR operations and who makes personal support visits to establishments advising on budgetary progress and updates.

This level of support frees Heads of Establishments to concentrate on the educational

management aspects of DMR.

Full training is given to staff including support for Head teachers as part of the initial induction process as well as ongoing input e.g. update training as and when the scheme and related procedures change. Training and ongoing support for School Business Officers is also in place in order to support the implementation of the scheme. A full financial manual for schools will be produced to support Head teachers and SBOs in implementing the scheme, outlining paperwork and forms to be submitted e.g. for applications to carry forward budget.

Additional funding streams, including for example, at the time of publishing, Pupil Equity Funding (PEF), are not core funding and are not included within the traditional funding mechanisms of DSM schemes. However, as above and for clarity, School Business Officers now monitor the ongoing individual School PEF budgets within their cluster, providing real time budget information to head teachers as well as updating them with the setting of the annual PEF strategy linked to the budget given to each school. This further empowers Head teachers to be able to spend this budget as close to the level of need as is possible.

9. Areas of Expenditure Devolved and Not Devolved

Head Teachers / Head of Centres are given maximum flexibility over their budgets, however there are areas of expenditure that are generally not considered suitable for devolution. The reasons for this include but are not limited to: areas outside the influence of the Head Teacher / Head of Centre; areas that are too bureaucratic; have unacceptable levels of risk; benefit from economies of scale; require professional expertise; and are complex by their nature.

Funds are held centrally where it would be inappropriate to allocate them to establishments on an average basis at the outset. This approach is taken where schools' actual needs cannot reasonably be identified in advance, or where the need relates to particular individual pupils.

Provision is made centrally and funds are not included in delegated budgets for:

- Central support services
- Quality Improvement Service
- Psychological Service
- Additional Support Needs e.g. transport and staffing
- Capital expenditure, including all PPP costs
- School meals and milk
- Bursaries, clothing and footwear grants
- Expenditure supported by central government specific grants
- Home to school transport
- Premature retirement costs
- Education maintenance allowances
- Administration costs of Parent Councils
- LA contracted work on managing the School Estate
- School security running costs

Property costs are related to actual necessary expenditure. Schools with relatively small pupil rolls in large buildings are not penalised. Higher energy costs are no disadvantage to schools in older, inefficient buildings. There is no liability to establishments where they have higher than average property rates.

The repairs budget is not delegated. Repairs and maintenance monies are not devolved but

spent according to actual priority needs as they arise. There is therefore no disadvantage to schools in older buildings or at high risk from vandalism.

Contingency funds remain available from the authority to help establishments facing unforeseen or emergency circumstances during the financial year for example in teacher staffing or in supplies and services.

The devolved school budget for all other expenditure at school level is provided as a monetary value. This is calculated as a per capita allocation based on pupil census numbers.

At the start of the financial year, and following appropriate consultation, Head Teachers / Head of Centres are required to vire their devolved school budget to the relevant budget lines in line with their planned spend. In accordance with audit requirements, details of the devolved budget allocation should be processed by the school's School Business Officer and submitted to the Head of Service (Education) by 31 May each year.

10. Budget Line Allocations

School Business Officers have details of full budget lines available within the financial system. Details of the more commonly used budget lines are listed below:

TEACHERS TRAVEL & SUBSISTENCE	14192
COVER - SCHOOL FUNDED	14231
DMR PROPERTY COSTS (1)	20062
DMR SUPPLIES NON PUPIL (2)	30095
DMR PUPIL RESOURCES (3) a	30096
DMR ADMINISTRATION COSTS (4)	50064
DMR OTHER EXPENDITURE (5)	60032
STAFF DEV TRAINING - TEACHERS	60064
PARENT COUNCIL	61053

11. The Scheme in Detail

Each school's budget is an aggregate of separate allocations for each area of spending. An appropriate approach is taken for each area. This might be a 'per capita' amount, or a fixed sum, or a flat rate plus a certain sum per pupil, or actual costs assessed on a historical pattern of need.

Minimum standards which must be maintained to ensure the authority's discharge of its obligations are set in some areas of spending. The minimum standards include adherence to any relevant local and national agreements

From each current financial year schools will be able to carry forward up to £20K. Schools will be expected to outline what this carry forward is to be provisionally used for. Under this new SOD HTs can use any of the provisional funds for anything including employee costs. This is designed to give HTs as much flexibility in spending their budgets as possible.

Schools can apply to carry forward more than £20K however this must be applied for including a plan for the spend and agreed by the Head of Education and Chief Financial Officer. This does away with the previous arrangements where 10% of each school's original devolved budget plus £10k Capital Item Replacement Fund (CIRF) was allowed to be carried forward. Schools cannot carry forward a cumulative amount more than £60K and if this is required then this must be applied for and agreed by the Head of Education and Chief Financial Officer.

The practical administration of the scheme is outlined in the schools' financial manual and guidance that supports implementation of this SOD.

12. Property Costs

All costs for heating, lighting, rates and cleaning are devolved to schools under DSM. However, any over or underspends are not attributed to the school DSM budget and therefore no virement can take place from these lines. The budget holder has a responsibility to reduce unnecessary spend on these lines e.g. turning off lighting and heating when not in use.

It is not proposed to devolve the repairs and maintenance element of the budget, given the pressure this budget is under. It is not considered feasible to devolve the budget without risk of serious under-funding in many individual cases. Expenditure will therefore continue to be led by priority needs as they arise.

13. Authority Contracts

Catering, cleaning, janitorial, property work and ground maintenance services are provided through council contract arrangements on the basis of supplying the service to all establishments.

This approach ensures full public accountability in the delivery of services in these areas to specifications which are guaranteed to meet the authority's obligations in terms of relevant legislation, health and safety standards and fire, building and planning regulations.

Establishments are able to enhance service levels further from within their own overall resources.

In relation to the purchase of supplies, the Council's Procurement Service together with the Scotland Excel, negotiate bulk contracts to which all establishments have access.

The authority will continue vigorously to pursue best value for money in seeking to establish discounted contracts within which, wherever possible, establishments have a choice from ranges of individual items of guaranteed quality where specification can be traded against price.

14. Consultation Arrangements

Currently budgets for Parent Councils are assigned within the school' DMR is £400 per primary and £500 per secondary school. Head teachers should work with their Parent Council to ensure that they are aware of this budget and agree it spend on an annual basis. If this money is underspent at the end of each financial year then Parent Councils can opt to hand this money back to the school. Such an agreement should be made in line with each Parent Council's constitution and in consultation with the Head teacher.

In exercising their delegated powers under DMR, Heads of Establishment seek to proceed by consensus achieved through participation and consultation approaches.

The DMR scheme incorporates a mandatory requirement for Heads of Establishment to establish formal consultative procedures with their staff, both teaching and support personnel. In all but very small establishments the formal mechanism should include the setting up of an elected staff committee, which should wherever possible involve at least one member of the non- teaching staff. The Head of Establishment and School Business Officer are not members of this committee and attend meetings in an ex officio capacity.

The staff committee is a mechanism which ensures the kind of close staff involvement with more detailed DMR decision-making which is impractical on a whole school basis.

In smaller establishments, the full staff should be consulted.

Heads of Establishments are required to consult formally, in advance, with the full staff on proposals for significant virement of funds from one budget head to another. This can be closely related to establishment development planning procedures.

Proposals must be circulated to staff in advance of any meeting, with the outcome of the consultation being recorded and made available to staff, who must be advised subsequently of decisions and their rationale finally taken by the Head of Establishment.

Subject to the foregoing, the authority is not prescriptive regarding the finer detail of staff consultation and DMR, allowing establishments to evolve effective agreed internal arrangements which secure meaningful staff involvement while not impeding unnecessarily the day to day management of the establishment.

The success of DMR depends on a foundation of partnership with all who contribute to the education of pupils.

It is therefore a cornerstone of DMR that Parent Councils (or any future parental representative body) exercise their statutory powers of approval over expenditure plans relating to the purchase of teaching and learning materials.

Heads of Establishment will agree consultation arrangements with their Parent Councils. Significant spending proposals should be the subject of advance consultation with the Parent Council. Beyond that, consultations might be held with a Parent Council sub group or with the chair of the council. It is normal practice to agree with Parent Councils that routine matters of budget adjustment, and for all

expenditure agreed in principle, a periodic update report to the Parent Council would suffice. This will also include the planning of spending of Pupil Equity Funding (PEF).

In the exceptional circumstance of a Parent Council, after the fullest discussion internal to the school, continuing to hold the most serious concern over a Head of Establishment's intentions in the exercise of delegated powers, it will be open to the Parent Council to raise the matter with the Head of Education.

15. Appointment of Staff

The full process for allocating and appointing staff is laid out in the document "Education Staffing Procedures" (extracts below in Appendix 1). This is updated on annual basis ahead of the annual staffing exercise.

Following established practice which has been proven to be of good practice, the budget allocation, at school level for both teaching and support staff will be based on actual salary. Account will also be taken of salary conservation and promoted post structures in accordance with both local and national conditions of service as applied by Inverclyde Council and will be funded centrally.

This method of budgeting ensures that heads of establishments have freedom to appoint staff without the pressure which could influence the recruitment process of engaging inexperienced staff. This ensures the council's recruitment procedures are followed and staffing standards maintained.

Inverclyde Council will continue to be the employer of all school staff. Appointments to both teaching and support staff vacancies, will be in accordance with staffing standards, policy documents and standard circulars. Both policy and circulars will regularly be updated to reflect legislative requirements, national conditions and local agreements.

Staff who have been identified as surplus within an establishment will be deployed in accordance with negotiated agreement with the relevant representative body. Surplus staff can be both promoted and unpromoted.

16. Use of School Premises Outside School Hours

Currently schools have no direct involvement in the use of their premises outside school hours.

As part of the formula for each school's DMR relating to cleaning materials etc, consideration is given to the amount of usage of the building through lets and additional funds are built in to amounts for resources such as cleaning materials etc

Appendix 1 The staffing exercise inc staffing formulas, taken from “Education staffing process” document

1. The Staffing Exercise

The staffing Exercise starts after P1 Registration at end of January each year and is completed for all Primary, Secondary and ASN Schools/bases within Inverclyde.

The exercise is on-going from January until August each year.

The exercise is completed to allow each school to be given an entitlement for all teaching staff for the coming School year, taking into account many factors including the school roll, free school meals (Deprivation), Management time and the Senior Management Team entitlement.

The exercise is completed jointly by HR and Education HQ and is broken down into 7 Milestones.

These milestones are detailed on the timeline (appendix 1) which should also help provide a checklist of the staffing process as it progresses.

2. School Roll Information/Class Structures – Primary

Primary 1 registration takes place for Primary Schools around the 2nd week in January. Primary 1 Figures are obtained from Education HQ.

Primary Head Teachers provide an estimate of their roll for P1 – P7. However this is an estimate only. Differences should be discussed with Education HQ during the exercise however the figures agreed with Education HQ are those used to calculate school entitlement.

Primary 1 figures can change on a daily basis until all placing requests are usually considered around first week in February and school rolls will be continually changed to go up or down until the placing requests are finalised.

Primary Placing Requests – Head of Education deals with P1 registration and placing requests can continue until February/March due to appeals.

Primary Class Structures – Head of Education deals with Primary class structures taking into account Maximum class size and Composite Classes. The amount of classes within a school has an effect on the school entitlement.

Primary Class maximum sizes are as follows:

P1 – 25

P2-3 – 30

P4-7 – 33

Composite Class Maximum **25**.

Education HQ will confirm the class structure for each primary school which is used to calculate each school's entitlement.

3. Formula/Entitlement - primary

The formula used to calculate entitlement in Primary Schools is as follows:

No. of classes to be formed + 0.1 FTE per class for NCCT + 1.0 FTE for HT + XFTE for DHT (determined by Roll) + XFTE for PT (determined by Roll) + Deprivation based on no. FSM x Roll = XX FTE + Timetabling Flexibility + Nursery Management Time = XFTE (Nearest decimal point)

NCCT = non-class contact time

Timetabling Flexibility = (no. of classes + non-class contact FTE + HT Management time + DHT

Management time + PT Management time + deprivation FTE) x 4%

Deprivation = (see [deprivation figures](#) section for information)

The following may also be allocated to each primary school **in addition to their calculated entitlement above:**

- Learning Support - Each Primary school is allocated an additional 0.5fte for Learning support.
- Probationers – Each primary school is allocated 0.1 per probationer allocated (as applicable)
- Trade Union time - Where applicable and as negotiated under Standard Circular 8.9 Appendix 3
- Nurture – the following schools are also allocated an additional 1.0fte for a Nurture Teacher
 - Aileymill
 - King's Oak
 - Newark
 - St Andrew's

(There may also be schools allocated a Nurture teacher through [Attainment Challenge](#) or [PEF funding](#). However this is an additional allocation and separate from core staffing)

- Misc Additional Allocation – Education HQ may also add additional FTE to selected primary schools based on the need of the school. This is noted within the pro-forma as “ADDITIONAL ALLOCATION Authorised by Head of Education”

4. Management Structure

The Management structure within Primary schools is detailed within LNCT 09.

The Senior Management Team within a Primary School is determined by the Roll. All Primary Schools will be allocated a Head Teacher, 1.0FTE and a Depute Head Teacher, 1.0FTE. However the allocation of a Principal Teacher is dependent on the school roll. As detailed within LNCT 09 revised Principal teacher entitlement is as follows: (based on new LNCT 09)

- Roll of 250-350 – 1 Principal Teacher
- Roll of 351–450 – 2 Principal Teachers
- Roll of 451-500 – 3 Principal Teachers
- Roll of 501+ - 4 Principal Teachers

The school roll must be consistent for 2 years in order to gain or lose entitlement to a Principal Teacher on the 3rd year.

Where the roll of the school is in excess of 500, and an additional DHT post has been authorised by the Corporate Director, it will be for the Director to decide whether a fourth PT post is also authorised.

5. Primary Management Time

The school is also entitled to Management Time for the Depute Head and Principal Teacher (if applicable) as detailed within LNCT 09 (appendix 3).

Management time for Depute Head Teachers is dependent on the roll:

Less than 250 – 0.2fte	
250-300 -	0.3fte
351-400 -	0.4fte
451-500 -	0.5fte
500+ -	0.6fte

Management time for Principal Teachers is **0.1fte** for each Principal Teacher in the school. Remember entitlement to a Principal Teacher is dependent on the roll – see [Management Structure](#).

6. Nursery Management Time

Several of our Primary Schools also have a nursery attached. If the nursery has their own Head of Centre then they are not included and do not impact the primary school's staffing. However if there is no Head of Centre and the Primary Head Teacher is responsible for the nursery the school is entitled to additional fte within their staffing allocation. Each of these schools are given an additional 0.2FTE within their staffing entitlement for Nursery Management Time.

This currently applies to the following schools (as at school year 19/20):

- Aileymill
- Inverkip
- Kilmacolm
- King's Oak
- Lady Alice
- Moorfoot
- St Francis'
- St John's
- St Josephs (new for staffing at Aug 21)
- Wemyss Bay
- Whinhill

7. Secondary School Roll Information

Secondary Rolls - Primary 7 figures are obtained from Education HQ.

Secondary Head Teachers will also provide an estimate of their roll for S1 – S6. However this is an estimate only. Differences should be discussed with Education HQ however the figures from Education HQ are those used to calculate school entitlement.

Again placing requests will need to be considered and rolls will continue to change until all placing requests are finalised.

In addition from 2020, Secondary S5 & S6 roll figures when being moved on from S4 & S5 should be adjusted for a 95% stay on rate.

8. Formula/Entitlement

The formula used for staffing in Secondary Schools is as follows:

10.25 + (Pupil Roll x 0.05975) + Deprivation based on FSM = Total Staffing Entitlement (FTE)

The following is also allocated to each secondary school **in addition to entitlement based on the school roll**:

- Probationers – Each school is also allocated 0.1 per probationer allocated (as applicable)
- Where applicable and as negotiated under Standard Circular 8.9 Appendix 3 Note: current position in Secondary schools regarding Trade Unions is as follows:
- St Stephen's – 0.2 FTE
- PGHS – 0.1 FTE

9. Management Structure

The Management structure within Secondary schools is detailed within LNCT 09 revised.

The Senior Management Team within a Secondary School is determined by the roll. All Secondary schools will be allocated a Head Teacher, however it depends on the roll as to how many Depute Head Teachers and Principal Teachers the school will be entitled to.

Please refer to LNCT 09 (r) Management Structures in Secondary to determine how many Principal and Depute Teachers a Secondary school is entitled to.

- Head Teacher no matter what the roll
- Depute Head Teacher dependent on the roll (See below)
 - Roll up to 700 – 2 DHT's
 - Roll 701-1150 – 3 DHT's
 - Roll over 1150 – 4 DHT's
- Principal Teachers Curriculum – All Schools have 14 Principal Teachers Curriculum (PTC) in each school. Up to six of these posts are core as detailed within LNCT16
- Principal Teachers Guidance – the number allocated is based on the school roll.
 - Between 251-500 – 3 PT Guidance
 - Between 501-750 - 4 PT Guidance
 - Between 751-1000 – 5 PT Guidance
 - Between 1001-1250 – 6 PT Guidance

Therefore in summary, Secondary schools will be allocated **14** Principal Teacher Curriculum and up to **6** Principal Teacher Guidance dependant on the roll.

10. ASN Formula/Entitlement

The entitlements for each ASN school/unit are calculated based on pupil/teacher ratio or an agreed fixed entitlement. These ratios were previously agreed and the relevant reports are saved - O:\Operations Change Mgmt\Change Management\Staffing Exercise\Staffing Exercise Procedures\Staffing Related Reports

The ratios for each establishment are as follows:

School/Unit	Ratio/Fixed FTE
All Saints Communication & Language Base (CLB)	1:5.1
Clydeview Deaf Unit	4.0FTE
Craigmarloch	40% at 1:4.5 60% at 1:5
ICOS	4.6FTE
LACC	3.6FTE
Lomondview	1:6
Moorfoot – Garvel	5.1FTE
Notre Dame – Stella Maris	1:6
Visual Impairment Unit (VI)	1.0FTE
Whinhill Gaelic	3.6FTE
Whinhill English as Another Language (EAL)	1.4FTE

11. Management Structure & Management Time

ASN school entitlement is different from Primary and Secondary. No additional entitlement is given to ASN for management or management time. Therefore the FTE for management is included in their overall entitlement.

12. Deprivation Figures

This is based on the number of free school meals (FSM) within schools. FSM figures are obtained from Education HQ.

- **How to calculate Deprivation Formula**
 - Deprivation percentage = number of free school meals at the school divided by the school roll for that year
 - Example
 - FSM = 165

- Roll = 341
- $165 / 341 \times 100 = 48\%$

Once you have your Percentage figure use the undernoted table to establish the FTE Deprivation Entitlement for Primary & Secondary

For the example above at 48% - for a Primary school the school would be given an additional 0.3, for a secondary school they would be given 0.5.

PRIMARY					
0-10%	11-25%	26-50%	51-75%	76% +	
0.1	0.2	0.3	0.4	0.5	

SECONDARY					
0-10%	11-25%	26-50%	51-75%	76% +	
0.3	0.4	0.5	0.6	0.8	

All schools Primary and Secondary are entitled to entitlement for FSM/Deprivation. This entitlement is added to calculation entitlement for each individual school within their individual sheet.

13 Business / Admin support for schools

Each Cluster has a full time School Business Officer (SBO).

Secondary

Fixed weekly term time clerical hours	Per pupil weekly term time clerical hours	Fixed weekly term time DMR hours	Per pupil weekly term time DMR hours	TOTAL Fixed weekly term time hours	TOTAL Per pupil weekly term time hours
43	0.108	13.75	0.0125	56.75	0.1205

Primary

Roll of 100 - 150	Roll over 150	Fixed weekly term time clerical hours	Fixed weekly term time clerical hours	Fixed weekly term time DMR hours	Per pupil weekly term time DMR hours	TOTAL Fixed weekly term time hours	TOTAL Per pupil weekly term time hours
30	10	30	10	5.5	0.0143	35.50	0.0143
				5.5	0.0143	15.50	0.1783

ELC

- Term Time establishments - 0.39 minutes per registered capacity
- 52 wk establishments – 0.39 minutes per registered capacity and an enhancement of 10 hours to cover extended day / year service

14. Pupil Support Assistant Allocation

Rationale

The recent independent review “Support for Learning: All our Children and All their Potential (June 2020)” states that: “The investment in Pupil Support Assistants must be measured for impact and improvement on children and young people’s experiences and achievements. Local authority and school managers must plan a strategy to review the deployment of Pupil Support Assistants, which takes account of recommendations from the current national research Education Endowment Fund (2018)”. This rationale for the proposed allocation of Pupil Support Assistants across establishments in Inverclyde takes account of the EEF and recommendations from the review.

Pupil Support Assistant time allocation to schools is based upon the premise that there should be equitable distribution of finite resources, based upon level of need as identified through objective, standardised processes, as well as individual/situational needs.

The following criteria for allocation of core PSA support has been taken into account:

- Size of school – based on roll
- Weighting has been given to establishments based upon size.
- Scottish Index of Multiple Deprivation 2020

Around 45% of datazones in Inverclyde are ranked in Scotland’s 20% most deprived datazones. Using the data provided by SIMD 2020, the percentage of the school roll living in SIMD 1 and 2 has been considered.

SIMD and FME data is used in the allocation of additional funding to schools through Scottish Attainment Challenge and Pupil Equity Funding. This can be used to fund additional Pupil Support Assistant hours

Weighting has been given to establishments based on percentage of a school roll living in SIMD 1 and 2.

- Percentage of school roll who are Care Experienced or have previously been Care Experienced.

This includes Care Experienced children/young people are those who are subject to a supervision requirement through the Children's Hearing system or some form of local authority intervention either at home where they continue to live with their family or away from home e.g. foster home, kinship care or residential care.

Weighting has been given to establishments based upon the percentage of Care Experienced or previously Care Experienced children/young people.

- Percentage of the school roll on Enhanced Universal Girfec Pathway and above – 1,2 or 3 on Seemis. i.e. Children/young people with additional support needs which necessitate individualised planning e.g. Single Agency Plan, Boxall Profile targets etc.

This percentage of the school roll is calculated by totalling the Girfec Pathway information on Seemis. This ensures that there is a greater weighting for children/young people with more complex needs. (i.e. those on 2 and 3, rather than total number of children/young people recorded as having an additional support need). This criterion should cover the children/young people whose needs have been discussed at the ASN Monitoring Forum as they will have individualised planning in place before being brought to the forum.

Weighting has been given to establishments based upon the percentage of the roll with this level of individualised planning.

- Individual children/young people may have complex needs which necessitate more than the establishment core allocation of PSA hours. Heads of Service, Education Officers and Educational Psychology Service will allocate PSA support to individual children/young people through consideration of the ASN Monitoring Forum cases. This will be reviewed on an annual basis before the formula is used to allocate core PSAs across the authority.

This criterion highlights variations in the reporting and recording of needs. Looking at the data for individual establishments, there is a variation in recording of Enhanced Universal support and above. Recent national research states that 30.9% of school pupils have barriers to learning. Across Inverclyde, it would appear that there may be some under reporting of ASN. It would perhaps provide a good opportunity for a working group of ASN Leaders to look again at a more consistent approach to Girfec Pathways

Points to PSA allocation 2021

Points from weightings	PSA FTE
21-30	9-11
11-20	6-8
0-10	3-5

Primary and Secondary Weightings

School Roll

Number of children (Primary)	Number of young people (Secondary)	Points
>350	>1000	10
300-349	900-999	8
250-299	800-899	6
200-249	700-799	4
150-199	600-699	2
<149	500-599	1

SIMD 2020

Percentage of school roll living in SIMD 1 & 2	Points
>90	10
70-89	8
50-69	6
30-49	4
10-29	2
<10	1

Care experienced children/young people

Percentage of school roll	Points
>6	10
5-6	8
4-5	6
3-4	4
2-3	2
<2	1

Enhanced Universal/Collaborative/Enhanced Collaborative/Individualised Planning

Percentage of school roll	Points
>40	10
30-39	8
20-29	6
10 to 19	4
<10	2

Points to PSA allocation

Points from weightings	PSA FTE
21-30	9-11
11-20	6-8
0-10	3-5

Extract from Scottish Government's Devolved School Management Guidelines

Reviewed on 14/5/21 for current status of the DSM Working Group with "RAG" status allocated. Some items are not applicable at present or need to be assessed by relevant staff.

Red	Amber	Green
Little or no progress	Some progress	Substantial Progress

Appendix A: Expected and Recommended Summary

These guidelines recognise that in relation to DSM the functions and roles undertaken within an empowered school system are not restricted to Head Teachers. Although the role of Head Teacher is identified throughout, shared and distributed leadership means that other staff members or groups may undertake an area or aspect of DSM. The guidelines support distributed leadership, collaboration and consultation whilst recognising that the accountability and responsibility will reside with the Head Teacher as the leader of their school, supported by the Local Authority.

In some cases the guidelines note statutory requirements on Local Authorities. For the avoidance of doubt, nothing in these guidelines detracts from those statutory requirements, which all Local Authorities must comply with.

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
Section 1 – General			
1.1 Local Authorities schemes adhere to financial regulations, deliver best value and ensure the efficient, fair and equitable distribution of resources.		Noted / expected practice.	Scheme complete in draft Feb 22 and complies
1.2 Head Teachers deploy the school's budget in accordance with best value principles and Local Authority procurement arrangements, with appropriate support and guidance from their Local Authority.		HTs require procurement guidance which is very specific to the situations which they most commonly encounter. Practical and easy to follow guidance is more likely to be followed and less likely to be misunderstood. Current Status – Still to be developed at a later stage with input from School Business Managers and Corporate Procurement anticipated. However, it is acknowledged that existing practice is likely to comply with best value principles.	
1.3 Local Authorities should ensure that devolution is meaningful and empowers school leaders to make appropriate, and informed decisions to best meet their local need in line with legislation and Local Authority policies, guidance and frameworks.	Local Authorities scheme clearly define areas of resources that are not devolved to schools.	It is important to be transparent as to why some resources are not being devolved to schools. Current Status – Broadly agreed by the DSM Working Group and will be covered within the new scheme.	Green

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
<p>1.4 Head Teachers are expected to ensure school expenditure is in line with the School Improvement Plan supporting the relevant Local Authority strategic plans, priorities and the National Improvement Framework.</p>		<p>Current Status – On-going practice for Education Officers and HTs to assess if additional work is required regarding this subject.</p>	<p>More so for PEF however aspects of DMR may apply. PEF costing much improved in 2021/22. CLPL and cover are ref but could be more consistent.</p>
Section 2 - Format and Publication			
<p>2.1</p>	<p>Local Authorities are strongly encouraged to utilise the format of the DSM Framework for their scheme. This is available from https://www.gov.scot/policies/s/schools/devolved-school-management/.</p>	<p>Noted / expected practice. Current Status – the working group is aware of this requirement.</p>	<p>Green</p>
<p>2.2</p>	<p>Where a school has a website, it is recommended that it should include a web link to the Local Authority published scheme.</p>	<p>Noted / expected practice. Current Status – Task for the final stage of introducing the new DSM scheme.</p>	<p>Once agreed in Mar 22 at E and C Committee this can be achieved.</p>

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
2.3	Local Authorities should consider publishing a summary of the authority's scheme, providing stakeholders summary information in an accessible way, using plain language.	This requirement could be aligned to the Committee approval stage and the summary made available on the Council and schools websites. Current Status – As 2.2 above.	As in 2.2
2.4	Published schemes should include the criteria and methodology used to create formulae-based allocations, staffing models and other resource allocations as appropriate. If formulae have been applied, the formulae should be included within the scheme.	Noted / expected practice. Current Status – the working group is aware of this requirement. Now added as App 1 to SOD	Green – to be added as an appendix
Section 3 – Training			
3.1	Local Authorities should provide specific DSM training to key staff groups including Head Teachers and Business Managers or associated posts.	Training arrangements are particularly important and must allow for coverage of all stakeholders who are to be trained, gauging their initial training needs and (to the extent possible) the delivery of training which best suits their learning styles. In particular, training must have an emphasis on practicality and dealing with common scenarios through worked examples. Current Status – the working group is aware of this requirement but for a later stage of the project.	Green – ongoing in relation to this and PEF. Scheme outlines this.

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
<p>3.2 Where school or establishment staff have a delegated budget responsibility they should be aware of the aims and principles associated with DSM, best value and adhere to financial regulations and Local Authority policies for the funds they are responsible for.</p>	<p>Training should be available for new and experienced staff members.</p>	<p>As noted above, training must allow for the training needs of each person and be clear on where more information and support can be found. Current Status – the working group is aware of this requirement but for a later stage of the project.</p>	<p>Green – will be covered at roll out of revised scheme</p>
<p>Section 4 - Consultation, Engagement and Transparency</p>			
<p>4.1 Consultation and engagement at all levels between Local Authorities, Head Teachers and stakeholders should take place to inform appropriate resource decisions, including: budget, staffing models and savings. This includes consultation on criteria used when determining how a formula is devised or applied and other methodology of distributing resources.</p>		<p>Consultation and engagements need to be clearly defined at each level or for various distinct groups of stakeholders. Transparency of process and content is required along with straightforward communication of formula options. However, these arrangements would need to be carefully timetabled to ensure overarching deadlines are met and to avoid excess analysis which does not add value given other priorities. Current Status – The DSM Working Group has effectively commenced this stage. SOD makes it clear how schools should consult re budget with stakeholders.</p>	
<p>4.2 Local Authorities should form appropriate mechanisms or forums for regular engagement and consultation with Head</p>		<p>In so far as possible existing mechanisms and forums should be used for engagement and consultation. For example, can small</p>	<p>Covered in</p>

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
<p>Teachers and wider stakeholders as appropriate.</p>		<p>online meetings be used or short online surveys be used for stakeholders such as parents/guardians.</p> <p>The aim should be to avoid new commitments which are time consuming but do not achieve useful output.</p> <p>Current Status – As 4.1 above.</p>	<p>revised scheme.</p>
<p>4.3 Consultation and engagement between Head Teachers and staff groups should take place to inform appropriate resource decisions, including: budget, staffing models, department budget allocations and savings.</p>	<p>Head Teachers should form appropriate mechanisms or forums for regular engagement and consultation with staff, parents and wider stakeholders as appropriate.</p>	<p>As above.</p> <p>Current Status – Current DSM practice still applies although it may vary by school.</p>	<p>Covered in draft scheme</p>
<p>4.4 Head Teachers should consult with staff, parent councils, pupils and the wider community on appropriate matters, these may include school staffing models, DSM decisions, allocation of departmental or class resources and include formulae or criteria used within the school.</p>		<p>Officers should aim for a degree of consistency between Head Teachers in terms of what is expected for practical consultation arrangements i.e. outlining expected minimum practice.</p> <p>Current Status – As 4.3 above.</p>	<p>Covered in draft scheme</p>
<p>4.5 Head Teachers share and discuss local school decisions, budget and resource allocations with staff groups and wider stakeholders as appropriate.</p>	<p>It is recommended that at school level this includes methodology and distribution of budgets and resources.</p>	<p>Partly covered above. Information can be shared with stakeholders in appropriate ways. For example, DSM documents which are available;</p> <p>* within a shared network drive folder; and</p>	<p>Covered in draft scheme</p>

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
		<p>* via the school and/or Council websites.</p> <p>E-mail can be used to signpost the existence and location of DSM information.</p> <p>Current Status – As 4.3 above.</p>	
<p>4.6 Local Authorities make information available to all stakeholders in relation to the Local Authority budget, education budget and delegated budgets to schools, including identifying areas of expenditure that are not devolved to Head Teachers.</p>		<p>Current Status – For a later stage of the project to implement the new DSM scheme.</p>	<p>Covered in draft scheme</p>
<p>4.7 It is expected that DSM schemes, and information published for stakeholders is accessible and is in plain language.</p>		<p>Current Status – For a later stage of the project to implement the new DSM scheme.</p>	<p>Draft scheme</p>
<p>4.8 Head Teachers are to ensure that any costs related to the curriculum are minimised to ensure equality of access.</p>	<p>Where charges exist for pupils, including both curriculum or extra-curricular activities (class materials, school trips, school uniform, etc.) they should be clearly detailed in school information published at the start of the academic session.</p>	<p>If not already in place, a Council wide (and Committee approved approach to curriculum related charges), including the funding of such charges for those families unable to pay (e.g. via school budget, relevant specific government grants or via School Funds, if approved by School Fund Committees), are all factors to consider. Also, there is a need to consider SG expectations around this subject.</p>	<p>Covered now by new SG policy on curriculum costs</p>

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
4.9	Any potential financial assistance, discounts or exemptions available, for example in relation to pupils in receipt of free school meals, should be included within this information.	As above.	Not yet in draft scheme
Section 5 – Collaboration			
5.1 DSM schemes should be informed by local priorities to enable it to contribute towards shared agendas and improved outcomes, it should enable stronger partnership working between schools and other agencies and stakeholders.		Noted / expected practice. Current Status – Being considered by the DSM Working Group.	Green
5.2 Local Authority decisions about education spending are made in a collegiate and transparent way paying due regard to Getting it Right for Every Child (GIRFEC) and the role of Local Authorities as Corporate Parents.	It is recommended that Local Authorities consider empowerment on an area or school cluster basis, enabling Head Teachers to influence decisions across geographical areas or school clusters.	Consider the extent to which this is relevant within a relatively small Education Authority. However, a pathway should exist for those Head Teachers who wish to innovate and collaborate in ways which require pooled DSM resources. Current Status – Still to be considered by the DSM Working Group.	Recommended aspect needs further consideration as to how this is articulated in draft scheme. There are examples of this in relation to PEF spending

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
<p>5.3 Head Teachers are expected to be collaborative and collegiate in their approach, challenging themselves and stakeholders to be solution focused embracing joint working with the learning community, parents, children and young people, teachers and support staff, partners, other schools and the Local Authority.</p>	<p>It is recommended that head Teachers work together to share and maximise resources to influence outcomes across geographical areas or school clusters.</p>	<p>Ensure existing mechanisms are used to share best practice. Current Status – For Education Officers and HTs to assess the extent to which this area needs to be developed.</p>	<p>Recommended aspect Needs further consideration as to how this is articulated in draft scheme. There is evidence of this in schools.</p>
Section 6 – Staffing			
<p>6.1 Local Authorities should empower Head Teachers to design a staffing structure to suit the school's context within their delegated budget and in accordance with SNCT and LNCT agreements and guidelines.</p>	<p>Local Authorities consider their approach when devolving staffing, this includes discussing with Head Teachers the complexities and risks associated with staffing allocations.</p>	<p>Noted / expected practice. Although HR will advise on these matters clarity of roles and broadcasting expected practice to all relevant officers are important factors to consider. Current Status – Core issue for the working group.</p>	<p>Green</p>
<p>6.2 Schemes should seek to devolve the appropriate resources to schools, whilst ensuring that legislative and contractual requirements are met and local circumstances and need taken into account.</p>		<p>Ensure clarity around what is and is not allowed whilst also have arrangements in place to quickly and effectively resolve any perceived contradictions between DSM freedoms and all other required practices. Aim is to ensure consistency across establishments whilst allowing Head Teachers to use the freedoms the SG expects to apply.</p>	<p>Green</p>

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
6.3 The Local Authority, with Head Teachers will seek to deliver the most appropriate and efficient use of staff resource ensuring equity, transparency and clarity whilst promoting and supporting collaboration and collegiate working.		Current Status – Core issue for the working group. Noted / expected practice. Current Status – Core issue for the working group.	Green
6.4 Head Teachers should play an active role in designing and reviewing recruitment and staffing approaches, both for their own school/s and for the Local Authority.		Noted / expected practice with HR advice being crucial along with HTs seeking advice when necessary. Current Status – Core issue for the working group.	Green
6.5 For all staffing matters, Head Teachers must adhere to the appropriate legislation and Local Authority, SNCT and LNCT agreements and guidelines.		As above. Current Status – Core issue for the working group.	Green
6.6 Head Teachers should be consulted on the allocation of support staff to schools.		As above. Current Status – Core issue for the working group.	Green
Section 7 - Professional Support			

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
7.1 Head Teachers in all schools should have access to professional support teams and functions.		Noted / expected practice.	Green
7.2 There should be transparency in the formulae or methodology in allocating professional support to schools.		Noted / expected practice. Current Status – Anticipate that the new DSM scheme will address this issue and assumed review of non-teaching staff in schools is complete or soon will be.	Scheme outlines the role of SBOs. Possible need to be clearer as to how
Section 8 – Accounting			
8.1 Head Teachers should have the provision to carry forward budget underspend or overspend in line with agreed and published Local Authority policy and criteria.	Intended use of carry forward of budget underspends are identified in School Improvement Plans or school budget spending plans.	Noted / expected practice and Finance will advise on the operational detail. Consider to what extent existing standard forms for accounting matters include summary notes of relevant DSM requirements and are also “user friendly” for new and promoted staff to use. Current Status – Core issue for the working group.	Covered in draft scheme
8.2	Procedures for managing carry forward of overspends are included within the scheme.	As above and clear procedures make it easier for staff to apply the procedure and demonstrate that they have done so. Current Status – Core issue for the working group.	Covered in draft scheme

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
8.3	Consideration is given towards enabling schools to deposit funds to save budget for planned and agreed future spend.	Current Status - Current practice will continue but is likely to be refined to allow for certain situations e.g. obtaining discounts for multi-year contracts.	Green
8.4	Head Teachers should have the provision to vire budget between budget headings in line with agreed and published Local Authority policy and criteria.	Current Status – the working group is aware of this issue.	Covered in draft scheme
Section 9 - Scheme Review			
9.1	Local Authorities undertake a three-year review with stakeholders and a peer Local Authority as they determine appropriate.	Noted / expected practice and overlaps with 1.4 above. Current Status – The DSM review continues and it is anticipated that lessons learned from this exercise will shape the conduct of future DSM reviews.	Green
9.2	Local Authorities are recommended, as part of ongoing self-evaluation, to update DSM schemes if changes are made which have a consequential impact on a scheme.	Noted / expected practice.	Green – current version outcomes need to review in Apr 23
9.3	Head Teachers are recommended to apply national standards and to undertake self-evaluation drawing upon the most appropriate, and current tools, at	Noted / expected practice.	In place but when we launch scheme

Expected SG Practice	Recommended SG Practice	Internal Audit Comments	Current Status
	<p>date of publication these include, but are not limited to: Education Scotland - HGIOS4 QI 1.5 Management of Resources GTC Scotland - The Standards for Leadership and Management: supporting leadership and management development Scottish Government and COSLA - Education Reform Joint Agreement and Head Teachers' Charter</p>		<p>need to then provide more input to HTs on this.</p>

Report To:	Education & Communities Committee	Date:	8 March 2022
Report By:	Corporate Director Education, Communities & Organisational Development	Report No:	EDUCOM/22/22/RB
Contact Officer:	Ruth Binks	Contact No:	01475 712748
Subject:	Health and Wellbeing in Schools - Guidance on Supporting Transgender Pupils in Schools and the National Health and Wellbeing Survey		

1.0 PURPOSE

- 1.1 The purpose of this report is to provide an update to Committee about the national guidance on supporting transgender pupils in schools and to seek approval to undertake an adapted version of the national Health and Wellbeing survey in Inverclyde schools.

2.0 SUMMARY

- 2.1 Supporting transgender pupils is an area where schools often seek support to get the best for all the young people involved. In a recent national survey it was found that more than half of transgender pupils had self-harmed and over 80% had experienced bullying.
- 2.2 A group was established to further develop guidance for Inverclyde. During ongoing meetings it became clear that the Scottish Government guidelines were significantly more comprehensive and of greater utility to school staff than the local developing ones. As a result of this the group recommended adoption of the Scottish Government guidance and that this should be preceded by a one page statement stating why this was the case. The Scottish Government guidance can be accessed at:
- <https://www.gov.scot/publications/supporting-transgender-young-people-schools-guidance-scottish-schools/>
- 2.3 Inverclyde has undertaken two specific Health and Wellbeing (HWB) surveys in secondary schools, the first in 2013 and the subsequent survey in 2019. The first survey led to the establishment of Clyde Conversations aimed at taking a deeper dive into some of the topics and to listen to young people about issues that are affecting them. The surveys, alongside Clyde Conversations, have given useful information on which to base decisions and has identified how best to support young people in their health and wellbeing.
- 2.4 A national HWB survey has now been developed by the Scottish Government, for use by local authorities. This gives the opportunity to have comparator information across the country, something that was not available for the 2013 and 2019 surveys. At the meeting on 25 January 2022, the Education and Communities Committee considered the survey and decided that officers be instructed to ascertain:
- (i) the possibility of creating two versions of the survey, one of which will include questions on sexual health and the other which will not contain questions on sexual health, and that pupils and parents will thereafter be given the choice as to which survey they complete, and
 - (ii) if the Scottish Candidate Number can be removed from the survey.

- 2.5 Officers have been working with the Scottish Government on the adaptations to the survey requested by the Education and Communities Committee and all of the requests from the January Education and Communities Committee are able to be progressed and are outlined in section 5.2 of this report.
- 2.6 The questions on sexual health for the S4 – S6 survey have been adapted and are attached as Appendix 1 to this paper.

3.0 RECOMMENDATIONS

3.1 The Committee is asked to:

- note the national guidance in place for best practice in supporting transgender pupils in schools
- agree to the adapted Health and Wellbeing survey being implemented in Inverclyde schools

Ruth Binks
Corporate Director
Education, Communities & Organisational Development

4.0 BACKGROUND

4.1 Guidance on supporting transgender pupils in schools

- 4.1.1 In 2020 Inverclyde had established a group to further develop guidance for schools in respect of transgender issues arising in our education establishments. This is an area where schools often seek support to get the best for all the young people involved. In a recent national survey it was found that more than half of transgender pupils had self-harmed and over 80% had experienced bullying.
- 4.1.2 The trajectory of the group changed in August 2021 when the Scottish Government issued its guidance in this area of work. It was realised then that the group required to revisit its work. As well as legal services, CLD workers and educational psychologists were involved in the group. The group had significant representation from educational psychology as, during termly negotiation with our schools, this issue has emerged as one where school staff requested significant levels of guidance. The first task that the group undertook was to look at the developing local guidance and to cross reference against the Scottish Government guidelines to look at areas that were missing or that superseded the local guidelines in terms of quality of advice.

4.2 2021/22 National Health and Wellbeing Survey

- 4.2.1 Inverclyde has undertaken two specific Health and Wellbeing (HWB) surveys in secondary schools, the first in 2013 and the subsequent survey in 2019. The first survey was the inspiration for Clyde Conversations, aimed at taking a deeper dive into some of the topics and to listen to young people about issues that are affecting them. The surveys, alongside Clyde Conversations, have given useful information on which to base decisions and has identified how best to support young people in their health and wellbeing.
- 4.2.2 At the meeting on 25 January 2022, the Education and Communities Committee considered the new national survey and decided that officers be instructed to ascertain:
- (i) the possibility of creating two versions of the survey, one of which will include questions on sexual health and the other which will not contain questions on sexual health, and that pupils and parents will thereafter be given the choice as to which survey they complete, and
 - (ii) if the Scottish Candidate Number can be removed from the survey.

5.0 PROPOSALS

5.1 Guidance on supporting transgender pupils in schools

- 5.1.1 During ongoing meetings of the group formed to further develop the local guidance it became clear that the Scottish Government guidelines were significantly more comprehensive and of greater utility to school staff than the local developing ones. As a result of this the group recommended adoption of the Scottish Government guidance and that this should be preceded by a one page statement stating why this was the case. The Scottish Government guidance can be accessed at:
- <https://www.gov.scot/publications/supporting-transgender-young-people-schools-guidance-scottish-schools/>
- 5.1.2 In order to take things forward in the future it is felt that further engagement with our young people will be required and, consequently, an exercise will take place at Clyde Conversations in February 2022 to gain the voice of our pupil population. In light of the level of requests for support from school staff it was also felt that further support for school staff should also be offered to help them to support the young people and their families and to meet any challenges that they face.

5.1.3 It is important to remember that guidance is meant to provide support and examples of good practice to those who are helping young people and their families face difficult and sensitive situations. It is not a set of inflexible rules that are set in stone. Every situation differs depending on the circumstances and the context and it is paramount that practitioners work with young people and their families to provide the best support they can.

5.2 2021/22 National Health and Wellbeing Survey Proposals

5.2.1 Officers have been working with the Scottish Government and another local authority on the adaptations to the survey requested by the Education and Communities Committee. All of the requests from the January Education and Communities Committee are able to be progressed. This means that:

- The Scottish Candidate number is removed from all surveys
- There will be an “opt in” for permission to complete the survey rather than an “opt out”
- That 2 surveys will be offered in S4–S6. The first being a survey without any sexual health questions. An additional second survey will be offered for S4-S6 which will only include the sexual health questions
- That the surveys will be made available to parents prior to completion

5.2.2 Officers are liaising with other authorities and the diocese to adapt and agree the final wording of the sexual health questions in the second survey for S4-6. The proposed questions are attached as Appendix 1 to this paper.

6.0 IMPLICATIONS

6.1 Finance

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

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

6.2 Legal

Legal Services were represented on the group considering the national guidance for supporting transgender pupils in schools.

6.3 Human Resources

N/A.

6.4 Equalities

Equalities

- (a) Has an Equality Impact Assessment been carried out?

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

- (b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
X	NO

- (c) Data Protection

Has a Data Protection Impact Assessment been carried out?

X	YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.
	NO

6.5 Repopulation

N/A

7.0 CONSULTATIONS

- 7.1 Consultations have taken place with representative groups from head teachers, parents and pupils to inform this paper.

8.0 BACKGROUND PAPERS

- 8.1 Education & Communities Committee – 3 November 2020 - agenda item 16a - Inverclyde Council Schools Health and Wellbeing Survey 2019
Education & Communities Committee - 25 January 2022 – agenda item 16 – Guidance on Supporting Transgender Pupils in Schools and the National Health and Wellbeing Survey