

EAST RENFREWSHIRE COUNCILEDUCATION COMMITTEE6 October 2022Report by Director of EducationIMPROVING OUTCOMES THROUGH THE PUPIL EQUITY FUNDING**PURPOSE OF THE REPORT**

1. To inform Education Committee of:
 - a) the progress made by schools during 2021-22 in improving outcomes through their use of Pupil Equity Funding; and,
 - b) the interventions used and the good practice developed by schools to improve excellence and equity, and achieve positive outcomes for all children and young people during 2021-22.

RECOMMENDATION

2. It is recommended that Education Committee comment on and note this report as a summary of the progress made by schools in improving outcomes through the Pupil Equity Funding during 2021-22.

BACKGROUND

3. The Education Department's vision statement "Everyone Attaining, Everyone Achieving through Excellent Experiences" reflects the commitment and expectation that all learners will be supported to realise their potential.
4. Members will be aware of the Local Improvement Plan 2021-2024, which outlines high level areas for improvement for all services and schools. The plan includes '*An Improvement in the attainment of disadvantaged children and young people*' as one of the expected outcomes and impacts. Previous Local Improvement Plans contained similar objectives, which have been reported on through the annual Standards and Quality Report.
5. Elected members will also be aware that the Outcome Delivery Plan 2021-24 includes, as in previous years, specific indicators and targets relating to the performance of disadvantaged children and young people.
6. The Scottish Attainment Challenge was launched by the First Minister in February 2015. This included establishing the £750 million Attainment Scotland Fund. The Scottish Attainment Challenge is focused on achieving equity in education, specifically by ensuring every child has the same opportunity to succeed, with a particular focus on closing the poverty-related attainment gap.
7. As part of the Attainment Scotland Fund, the Scottish Government has allocated additional funding directly to schools, targeted at closing the poverty related attainment gap. The Pupil Equity Fund (PEF) was initially made available from April 2017. In 2021-22, for each

child in a publicly funded establishment who was eligible and registered for free school meals, schools were allocated £1,200. An additional £20m Pupil Premium was allocated by Scottish Government in 2021-22 to support education recovery efforts for children and young people from disadvantaged backgrounds. This represented a 15% uplift to the PEF allocations to individual schools. In total East Renfrewshire schools were allocated £1.62 million in 2021-22; Appendix 1 provides a summary of the allocation by school.

8. National guidance is provided annually by the Scottish Government to help schools plan how they invest their PEF allocation. This guidance contains a number of key principles including:

- Head teachers must have access to the full amount of the allocated PEF
- The PEF must enable schools to deliver activities, interventions or resources which are clearly additional to those which are already planned
- Head teachers must work in partnership with each other, and their local authority, to agree the use of funding, taking account of the statutory responsibilities of the authority to deliver educational improvement, secure best value, and the authority's role as employer
- Parents and carers, children and young people and other key stakeholders should be involved in the planning process
- Funding must be provided for targeted support for children and young people affected by poverty to achieve their full potential; although PEF is allocated on the basis of free school meal eligibility, head teachers can use their professional judgement to bring additional children into targeted interventions
- Schools must have plans in place at the outset to evaluate the impact of the funding.

9. The Education Department has provided additional local guidance to support schools in their use and reporting of the Pupil Equity Fund. This is revised annually and is specific to our local circumstances. The advice is set in the context of the existing approaches to self-evaluation for school improvement and takes account of existing sources of research and evidence.

10. Head teachers were asked to develop PEF plans detailing how resources would be used to provide targeted interventions in literacy, numeracy and health and wellbeing to close the poverty related attainment gap. In developing these plans head teachers were asked to set out their rationale for the use of the funding, based on a clear contextual analysis which identifies the poverty related attainment gap in their schools and takes cognisance of evidence about what is known to be effective at raising attainment for children affected by poverty. PEF plans also reflected the need to support disadvantaged pupils' recovery from the global pandemic through this resource in a context of ongoing disruption during 2021-22.

11. In developing their PEF plans schools were asked to ensure collaboration with pupils, parents and carers, Trade Union colleagues, community partners and their cluster.

12. The Quality Improvement Team and the Education Leadership Team worked alongside schools to provide support and challenge as Head Teachers formulated their PEF plans.

REPORT

13. As part of the conditions associated with the grant for the PEF, the Education Department is required to produce a report summarising outcomes and performance at an authority level. In order to reduce duplication and bureaucracy this is linked to existing reporting requirements as set in the Standards in Schools etc. Act 2000. This report sets out a high level summary of the progress of East Renfrewshire schools in improving outcomes through the use of their PEF during 2021-22. Summary performance results are attached in Appendix 2.

14. In line with the national priorities the Local Improvement Plan includes a number of activities which are intended to bring about improvement in the attainment and experiences for all pupils. For example, improved reading, writing and mathematics throughout the years of the broad general education and improved attainment in the senior phase. These outcomes for all pupils are also summarised in Appendix 2.

15. The Education Department and schools have an unrelenting focus on achieving excellence for all pupils in East Renfrewshire. The additional interventions targeted at achieving equity for pupils experiencing disadvantage, are also supported and enhanced by the wide range of improvement activities undertaken to improve the curriculum, learning, teaching and assessment for all.

16. A range of measures were used to provide evidence of attainment including standardised tests, Curriculum for Excellence attainment, class and school assessments and data from online literacy and numeracy programmes. Effective use of data played a significant role in selecting, monitoring and targeting interventions.

17. As part of national scrutiny of local authority progress with the Scottish Attainment Challenge, officers worked with a link Education Scotland Attainment Advisor in June 2022 to evaluate the progress made in tackling educational inequity over the period from 2019-22. The resulting Education Scotland Recovery and Progress Report highlights the following key strengths in East Renfrewshire:

- The impact of the reading recovery programme on pupil engagement and attainment;
- Numeracy and literacy progress as measured through Curriculum for Excellence levels;
- Improvement in attendance, pupil motivation, engagement, confidence and self-esteem;
- Professional learning and collaborative opportunities for practitioners to support equity;
- The development of the Child Poverty Delivery Improvement Group, established in 2019 to support coordinated working across services to reduce the impact of child poverty;
- An increase in collaborative working with other establishments, partners, parents and local businesses;
- Leadership opportunities which have resulted in increased understanding of poverty-related barriers to learning, motivation and job satisfaction.

18. Established improving trends in attainment data have been interrupted from 2020 onwards following the COVID-19 pandemic. National comparison data for 2021-22 is not yet available, however a number of national research reports have evaluated the likely impact of the pandemic on children and young people. Scottish Government's report '[Scotland's Wellbeing: The Impact of COVID-19](#)' highlights the likelihood of:

- Negative impact on educational attainment for all age cohorts
- An increase in the poverty-related attainment gap due to differential experiences during the pandemic
- Negative effects on resilience, confidence, wellbeing and happiness of children and young people due to family pressures and uncertainty.

19. There is a strong link between children's attendance and attainment, therefore all ERC schools focus on increasing the attendance of all children and young people in order to maximise opportunities for learning. Schools worked to support all children and young people to successfully re-engage with in-school learning throughout 2021-22. Developing positive, inclusive learning environments and reducing exclusions leads to improved outcomes for all, particularly disadvantaged children and young people.

20. Children and young people experiencing poor health and wellbeing are more at risk of not achieving their potential. As part of their PEF plans establishments ensured that they adopted strategies to increase pupil motivation, engagement, resilience and wellbeing. PEF funding was also used to help reduce the Cost of the School Day to support the wellbeing of families living with poverty, including hidden poverty.

21. Head teachers used PEF funding in a variety of different ways to support learners in 2021-22. Almost all interventions were focused on mitigating the impact of the pandemic on disadvantaged learners. At an individual establishment level improvements reported by head teachers included reference to the following:

- ✓ Attainment in reading and mathematics as measured by standardised test scores
- ✓ Numeracy and literacy progress as measured through Curriculum for Excellence levels
- ✓ Reading age of pupils, reading comprehension skills, basic decoding skills, spelling and attainment in writing
- ✓ Pupil motivation, engagement, confidence and self-esteem
- ✓ Pupil attendance
- ✓ Family engagement in children's learning.

The above list is not exhaustive and plans for each individual school will be available on school websites.

22. All schools reported a number of challenges in implementing planned interventions during 2021-22, most notably the ongoing disruption to staffing caused by COVID-19 and high levels of pupil absence. Current attainment data indicates the ongoing impact of frequent disruption to children's education since session 2019-2020, for example the cumulative impact of disruption during P2, P3 and continuing into P4 has contributed to lower percentages of pupils in P4 attaining expected CfE levels in literacy and numeracy in 2021-22.

Next Steps

23. The impact of the COVID-19 pandemic represents a significant challenge to improving the equity of education outcomes and this is reflected in recent attainment data (Appendix 2). Schools are well informed through their own analysis of data and intelligence about the needs of their communities, and are keenly focused on addressing increasing inequity with support and challenge from the Education Department.

Areas where further improvement/development is necessary include:

- Improving attendance in primary and secondary schools, with a particular focus on emotionally-based school absence (EBSA)
- Reducing the poverty-related attainment gap in literacy and numeracy between the most and least disadvantaged learners
- Supporting ongoing recovery in literacy, numeracy and health and wellbeing outcomes for all learners.

24. A refreshed Scottish Attainment Challenge was launched in March 2022. This includes Strategic Equity Funding for the education department to provide further support and challenge to schools to improve education outcomes for children and young people impacted by poverty and tackle the poverty related attainment gap from 2022-26.

25. The department's Strategic Equity Funding Plan was presented to the Committee in September 2022. The Plan outlines how we will bring about improvement through a strategic focus on Wellbeing (Readiness to Learn), Learning and Teaching (Pedagogy for Equity) and Raising Attainment in Literacy and Numeracy.

26. The department refreshed its guidance to schools on Using PEF to tackle the Poverty-related Attainment Gap in May 2022 (Appendix 3), following the publication of new national guidance on the use of PEF. The refreshed guidance outlines a strengthened approach to central quality assurance of the use of PEF from 2022-23, which will be delivered in partnership with our Education Scotland Attainment Advisor. The department has also planned a Thematic Review of the Impact of PEF to take place in February 2023. These national and local approaches will enhance existing processes for collaboratively evaluating progress, and will support the planning of next steps to reduce inequity.

27. The Education Department uses target setting (setting of stretch aims) as an integral part of our evaluation, planning and improvement processes to support reflection and raise standards. We are in the process of collaborating with our schools to update these targets and will advise Education Committee at a future meeting.

28. This report is supplemented by a presentation to Education Committee on the progress made by two schools in improving outcomes for pupils through the use of their Pupil Equity Fund. This will illustrate the strategies and good practice developed by some schools and help members to continue to support and adequately challenge the department and schools to seek further improvement.

FINANCIAL AND EFFICIENCY IMPLICATIONS

29. This report provides evidence of improvements made as a consequence of additional funding from the Scottish Government, to support schools in closing the poverty related attainment gap. East Renfrewshire schools were allocated £1.62 million in 2021-22. Robust monitoring arrangements have been put in place for PEF, which ensure that the Education Department and Head Teachers have regular oversight of school level expenditure. PEF expenditure is separated from core school budgets, ensuring spending is not subsumed within the overall school budget and can be easily tracked and monitored.

30. Based on the 2021-22 financial year end 66% of the 2021-22 grant was spent. Schools are able to carry forward unspent funds into the new 2022-23 financial year and details of final spend across all schools for session 2021-22 will be available in due course.

31. East Renfrewshire schools have been allocated £1.47 million for 2022-23. Appendix 1 provides details of individual establishment allocations.

32. During 2021-22 schools were allocated additional funding from the department to support those pupils across the authority whose attainment is in the lowest 20% for literacy and numeracy. This money was aligned to complement and enhance PEF interventions at school level where appropriate, in order to maximise the impact of work to reduce the poverty-related attainment gap.

33. PEF allocations have been agreed for the next four years and will remain static over this period. Head teachers have been asked to consider ways in which they can develop and sustain improvements over a four-year period while also taking account of the significantly increasing costs of resources associated with inflation, including staffing. There are no other specific financial implications arising from this report.

PARTNERSHIP WORKING

34. This report focuses on the primary and secondary schools' progress in improving outcomes for pupils through the Pupil Equity Funding; however many of the results could not have been achieved without excellent partnership working across the Council, especially with parents/carers and other cluster schools.

CONCLUSION

35. This report provides a high level overview of East Renfrewshire Council's Education Department's progress in improving outcomes for pupils through the Pupil Equity Funding and illustrates strategies and areas of good practice developed by schools. The information presented here shows a positive picture and where there are particular areas for further improvement.

36. The department will continue to self-evaluate its performance, share best practice across establishments and take the necessary steps to progress those areas identified where there is further scope for improvement as noted above.

RECOMMENDATION

37. It is recommended that Education Committee comment on and note this report as a summary of the progress made by schools in improving outcomes through the Pupil Equity Funding during 2021-22.

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Appendices

1. Pupil Equity Funding Allocation: 2020-21 and 2021-22
2. Progress of ERC Schools in Improving Attendance, Exclusions and Attainment in 2021-22
3. Guidance to schools: Using PEF to Tackle the Poverty-related Attainment Gap

Background Papers

1. Local Improvement Plan 2022 - 2025
2. Outcome Delivery Plan 2022 – 25
3. Standards and Quality Report 2020 – 21
4. ['Scotland's Wellbeing: The Impact of COVID-19'](#)
5. [Education Scotland: Equity Audit](#)

APPENDIX 1**PEF Allocations by School 2021-22 and 2022-23**

School	Allocation 2021-22	Allocation 2022-23
Braidbar Primary School	£ 19,848	£ 22,050
Busby Primary School	£ 30,875	£ 44,100
Calderwood Lodge Primary School	£ 15,928	£ 17,150
Carlibar Primary School	£ 118,844	£ 113,925
Carolside Primary School	£ 11,027	£ 19,600
Crookfur Primary School	£ 29,405	£ 36,750
Cross Arthurlie Primary School	£ 71,062	£ 71,050
Eaglesham Primary School	£ 31,855	£ 34,300
Giffnock Primary School	£ 22,054	£ 28,175
Hillview Primary School	£ 60,035	£ 57,575
Kirkhill Primary School	£ 36,756	£ 32,400
Maidenhill Primary School	£ 9,802	£ 8,640
Mearns Primary School	£ 61,260	£ 54,000
Neilston Primary School	£ 50,233	£ 58,800
Netherlee Primary School	£ 25,729	£ 25,725
Our Lady Of The Missions Primary School	£ 37,981	£ 33,480
St Cadoc's Primary School	£ 24,504	£ 21,600
St Clare's Primary School	£ 22,054	£ 22,050
St John's Primary School	£ 55,134	£ 68,600
St Joseph's Primary School	£ 17,153	£ 18,375
St Mark's Primary School	£ 120,070	£ 118,825
St Thomas' Primary School	£ 25,729	£ 26,950
Thornliebank Primary School	£ 34,183	£ 29,400
Uplawmoor Primary School	£ 3,308	£ 2,450
Barrhead High School	£ 60,035	£ 69,825
Eastwood High School	£ 55,134	£ 63,700
Mearns Castle High School	£ 42,882	£ 41,650
St Luke's High School	£ 73,512	£ 78,400
St Ninian's High School	£ 40,432	£ 40,425
Williamwood High School	£ 33,080	£ 41,650
Woodfarm High School	£ 47,415	£ 39,960
Isobel Mair School	£ 123,745	£ 129,850
Total	£ 1,622,719	£ 1,471,430

APPENDIX 2

Attendance and Exclusions

	2019-20	2020-21	2021-22
Primary Attendance: P1-7	96.3	95.6	93.9
Secondary Attendance: S1-5	93.0	94.3	91.4
Number of exclusion incidents per 1000 pupils - Primary	0	0.2	0
Number of exclusion incidents per 1000 pupils - Secondary	4.6	2.3	5.1

No Care Experienced children and young people were excluded from school in 2021-22.

Primary Attainment: Excellence

Percentage of P1, P4 and P7 Pupils

	2018-19	2020-21	2021-22
% Attaining or Exceeding Expected Levels - Reading	91%	90%	89%
% Attaining or Exceeding Expected Levels - Writing	88%	87%	87%
% Attaining or Exceeding Expected Levels – Talking & Listening	94%	94%	93%
% Attaining or Exceeding Expected Levels - Numeracy	91%	90%	90%

**No data was collected for 2019-20 as a consequence of the Covid-19 pandemic*

Primary attainment in reading, writing, talking and listening and numeracy has decreased over the last three years.

Primary Attainment: Equity

Based on number of pupils registered for Free School Meals (FME) and the number of pupils living in deciles 1 and 2 (based on the Scottish Index of Multiple Deprivation).

	Pupils registered for Free School Meals			Pupils living in SIMD deciles 1 and 2		
	2018-19	2020-21*	2021-22	2018-19	2020-21*	2021-22
% Attaining or Exceeding Expected Levels – Reading	71	74	68	78	73	68
% Attaining or Exceeding Expected Levels – Writing	64	67	64	73	69	62
% Attaining or Exceeding Expected Levels – Talking & Listening	85	84	64	91	83	77
% Attaining or Exceeding Expected Levels – Numeracy	74	71	70	60	75	68

**No data was collected for 2019-20 as a consequence of the Covid-19 pandemic*

With the exception of writing, the attainment of pupils registered for free school meals across the main curricular areas has decreased over the last three years. For pupils living in SIMD deciles 1 and 2, attainment has decreased significantly across the main curricular areas except in numeracy.

Primary Attainment: Closing the Gap

	Percentage Change from 2018-19 to 2021-22		
	All Pupils	Pupils registered for Free School Meals	Pupil living in SIMD deciles 1 and 2
Reading	2% decrease	3% decrease	10% decrease
Writing	1% decrease	11% decrease	11% decrease
Talking & Listening	1% decrease	21% decrease	14% decrease
Numeracy	1% decrease	4% decrease	8% increase

From 2018-19 to 2021-22, overall attainment across the four curricular areas has decreased for all pupils and for pupils registered for free school meals and living in SIMD deciles 1-2. However, it has decreased for the latter 2 groups at a faster rate. As a result, the poverty related attainment gap has grown for our most disadvantaged primary aged pupils in P1, P4 and P7 over the last three years.

It should be noted that the numbers of those children registered for Free School Meals and/or living in SIMD deciles 1 and 2 represent a small percentage statistically (approximately 6%) of this demographic in East Renfrewshire.

Secondary Attainment: Excellence

Percentage of S3 Pupils

	2018-19	2021-22*
% Attaining or Exceeding Third Level - Reading	97.5	97.1
% Attaining or Exceeding Third Level - Writing	96.2	96.9
% Attaining or Exceeding Third Level – Talking & Listening	96.8	96.9
% Attaining or Exceeding Third Level - Numeracy	96.0	97.9

**No data was collected for S3 in 2019-20 or 2020-21 as a consequence of the Covid-19 pandemic*

	2018-19	2021-22
% Attaining Fourth Level - Reading	80.9	82.6
% Attaining Fourth Level - Writing	79.7	82.8
% Attaining Fourth Level – Talking & Listening	81.5	81.6
% Attaining Fourth Level - Numeracy	78.4	83.5

**No data was collected for S3 in 2019-20 or 2020-21 as a consequence of the Covid-19 pandemic.*

Secondary attainment (S3) at third and fourth levels in writing, talking and listening and numeracy has increased over the last three years. Reading has increased over the last three years at level 4 but decreased at level 3.

Secondary Attainment: Equity

Based on number of pupils registered for Free School Meals (FME) and the number of pupils living in deciles 1 and 2 (based on the Scottish Index of Multiple Deprivation).

Third Level

	Pupils registered for Free School Meals		Pupils living in deciles 1 and 2	
	2018-19	2021-22*	2018-19	2021-22*
% Attaining or Exceeding Expected Levels - Reading	90.0	89.7	97.7	94.5
% Attaining or Exceeding Expected Levels - Writing	92.0	89.7	97.7	93.2
% Attaining or Exceeding Expected Levels – Talking & Listening	93.0	90.6	95.4	94.5
% Attaining or Exceeding Expected Levels - Numeracy	88.0	89.8	93.1	95.9

**No data was collected for S3 in 2019-20 or 2020-21 as a consequence of the Covid-19 pandemic.*

Fourth Level

	Pupils registered for Free School Meals		Pupils living in deciles 1 and 2	
	2018-19	2021-22*	2018-19	2021-22*
% Attaining or Exceeding Expected Levels - Reading	65.0	65	60.9	64.4
% Attaining or Exceeding Expected Levels - Writing	60.0	63.3	59.8	67.1
% Attaining or Exceeding Expected Levels – Talking & Listening	63.0	63.3	69.0	67.1
% Attaining or Exceeding Expected Levels - Numeracy	54.0	50.9	54.0	54.8

**No data was collected for S3 in 2019-20 or 2020-21 as a consequence of the Covid-19 pandemic.*

Secondary Attainment: Closing the Gap**Third Level**

	Percentage Change from 2018-19 to 2021-22		
	All Pupils	Pupils registered for Free School Meals	Pupils living in deciles 1 and 2
Reading	0.4% decrease	0.3% decrease	3.2% decrease
Writing	0.7% increase	2.3% decrease	4.5% decrease
Talking & Listening	0.1% increase	2.4% decrease	0.9% decrease
Numeracy	1.9% increase	1.8% increase	2.8% increase

Fourth Level

	Percentage Change from 2018-19 to 2021-22		
	All Pupils	Pupils registered for Free School Meals	Pupils living in deciles 1 and 2
Reading	1.7% increase	0	3.5% increase
Writing	3.1% increase	3.3% increase	7.3% increase
Talking & Listening	0.1% increase	0.3% increase	1.9% decrease
Numeracy	5.1% increase	3.1% decrease	0.8% increase

At third level, from 2018-19 to 2021-22 with the exception of numeracy for pupils living in SIMD 1 and 2, the attainment of disadvantaged secondary pupils increased at a lower rate than the overall cohort or decreased. This demonstrates an increase in the poverty related attainment gap for pupils at this level.

At fourth level, the attainment of disadvantaged pupils in numeracy either decreased or increased at a significantly lower rate than all pupils. Conversely attainment in Writing increased at a higher rate than for all pupils, indicating a reduction in the poverty-related attainment gap in this skill.

APPENDIX 3

EAST RENFREWSHIRE COUNCIL EDUCATION DEPARTMENT

Guidance on using Pupil Equity Funding to tackle the poverty-related attainment gap

This guidance sets out the key considerations for schools in East Renfrewshire when planning how to use Pupil Equity Funding (PEF) to improve outcomes for children and young people impacted by poverty. It draws on the national guidance provided by Scottish Government, including the [National Operational Guidance 2022](#) and [Scottish Attainment Challenge Framework for Recovery and Accelerating Progress](#). The refreshed mission of the Scottish Attainment Challenge is **to use education to improve outcomes for children and young people impacted by poverty, with a focus on tackling the poverty-related attainment gap**. This mission must be at the centre of all PEF decision making.

Schools should set ambitious and achievable annual aims to improve outcomes for children and young people affected by poverty, which will lead to improvements in literacy and numeracy and support health and wellbeing. School aims should be aligned to local authority stretch aims.

It is essential that PEF funding is used to support activities, approaches or resources which are **clearly additional to universal** improvement plans and are carefully targeted at improving outcomes for those children and young people impacted by poverty. In this respect PEF supports children's equal right to education, as outlined in [Article 28 of UNCRC](#).

Scottish Government has defined six general principles for PEF planning: that it should be **collaborative, evidence informed, ambitious** and **evaluative**, and that it should detail the approaches to be taken to **measuring progress** and **embedding quality assurance processes**.

The above principles represent effective improvement planning and mirror the requirements of all School Improvement Plans in East Renfrewshire, as set out in the [2022 Guidance on Standards and Quality Reporting and School Improvement Planning](#). As is the case with School Improvement Plans, schools in East Renfrewshire retain autonomy in how they choose to present their Pupil Equity Plans. Schools may find that using the same format for PEF planning and School Improvement Planning helps to streamline documentation and reduce bureaucracy, while also supporting the creation of aims which are SMART and evidence-based.

Evidence Informed Rationale**Evidence informed:**

Plans are based on data and a clear understanding of the context of communities they will be implemented.

This data should include: local & national data and reference to research including SAC Theory of Change and Logic Model.

All use of PEF funding must be underpinned by a clear rationale based on evidence. Head teachers should be able to show how [data](#) has informed their decisions and what sources of [evidence](#) (Appendix 1) they have consulted that indicates that the planned interventions are likely to improve outcomes for learners impacted by poverty. This contextual analysis must support all planned use of PEF.

*'Head teachers must develop a clear **rationale** for use of the funding, based on a **robust contextual analysis** of relevant data which identifies the poverty-related attainment gap in their schools and learning communities and plans must be grounded in evidence of what is known to be effective at raising attainment for children affected by poverty.'*

PEF National Operating Guidance

While Free School Meal entitlement remains a useful way to identify many children and young people impacted by poverty, schools are also encouraged to look more broadly at the range of data and evidence they can access to identify learners who should benefit from PEF funding, including SIMD. The local [Child Poverty Action Plan](#) and national [Tackling Child Poverty Delivery Plan](#) highlight the following poverty risk factors which should be explored at school level:

- Lone parent families
- Minority ethnic families
- Families with a disabled adult or child
- Families with a young mother
- Families with a child under one
- Larger families (3+ children).

Collaboration



Collaborative:

Actively engage children, young people, families, communities, staff and partners in planning process.

Collaboration across schools and clusters, with community partners such as [Community Learning and Development](#), and with wider partners may provide opportunities to increase the reach and impact of PEF. Opportunities to pool resources should be explored wherever there is the potential to better meet the identified needs of targeted learners.

Close collaboration with the school's Educational Psychologist can help to ensure intersectional disadvantages are taken account of in planning targets and measures.

National organisations and third sector partners such as Child Poverty Action Group can support schools to reduce the impact of poverty on education outcomes. Reducing costs to families and increasing family income are important levers in tackling poverty, and can have a profound impact on wellbeing and learning. Schools should work with stakeholders to evaluate the [Cost of the School Day](#) and use PEF to reduce costs to families. Through effective collaboration PEF may also be used to increase family income, for example by working in partnership with the Money Advice and Rights Team.

As with all school improvement activities, all stakeholders should be involved in PEF planning and evaluating processes. Stakeholder engagement should be clearly outlined within planning and reporting.

Parents are key partners in improving outcomes for children and schools should involve parents in their PEF planning. Participatory budgeting (PB) is an effective way to engage with both parents and pupils, in particular those who face barriers to participation. The education department's [Participatory Budgeting Guidance for schools](#) outlines approaches and key considerations for successful PB.

Ambitious Aims, Measuring Progress & Evaluation



Setting ambitious and SMART aims:

Aims should be smart, measurable, achievable, realistic and timed. They also need to be ambitious enough to achieve long term goals of closing poverty-related attainment gaps.

outcomes.

Aims should be developed annually which identify who will benefit, what will change, by how much and when. It is important that the [measures](#) of progress are clearly defined with sufficient detail at the outset, so that progress can be tracked closely over time. It may be helpful to consider at the planning stage what the next step will be, if tracking indicates that the planned approach is not leading to positive



Evaluative:

All plans should have aims and measures which allow leaders to clearly state whether aims have been achieved.



Measuring progress:

SMART measures and baseline data are needed to be able to show progress towards aims. Regular tracking and monitoring will support staff respond timeously to interventions which are not having the desired impact and make adaptations.

*'Schools must have plans in place at the outset to evaluate the impact of the funding. These plans should outline **clear outcomes** to be achieved and how progress towards these, and the impact on closing the poverty-related attainment gap, will be **measured**. If, as a result of this ongoing monitoring, the plans are not achieving the results intended, these plans should be amended. Plans for sustainability must be considered as part of this.'* PEF National Operating Guidance

Pupil wellbeing is an essential pre-requisite to learning and attainment. In developing aims, schools should take a holistic view of pupil outcomes and consider the most appropriate indicators of improvement for children impacted by poverty. The following Key Indicators should be considered:

- Attainment
- Attendance
- Inclusion
- Engagement
- Participation

Teaching staff who know pupils well have a key role to play in helping to identify the most appropriate aims and measures, as well as in establishing baseline data and tracking the impact of interventions.

Schools should plan how they will know that outcomes are on track to being achieved. Measures should indicate where evidence will be found and what this will look like. Regular monitoring of progress towards outcomes should be planned across the year and adaptations made if required. It may be helpful to consider short, medium and longer term aims across the four-year period for identified learners. Aims should be ambitious and represent the best possible improvements in outcomes for learners over time.

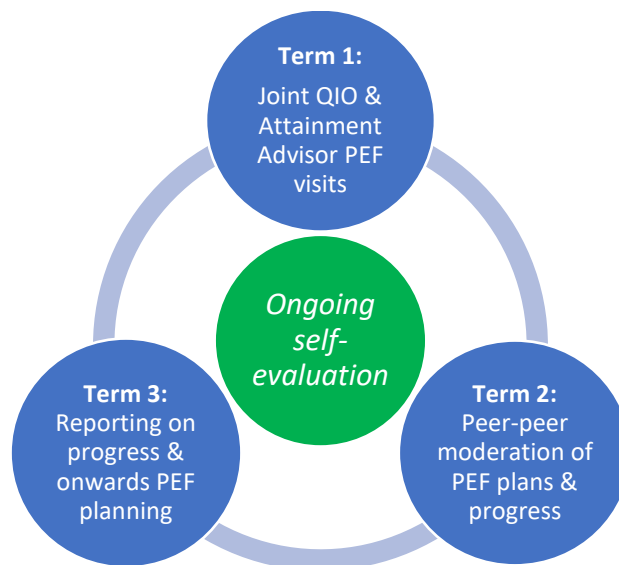
Quality Assurance



Quality assurance processes embedded to support the development and implementation of SAC plans. This can be both internal or external, involve peers or senior leaders.

PEF Plans and School Improvement Plans should clearly identify how progress will be monitored and evaluated. School Standards & Quality Reports should also outline progress with improving outcomes for children and young people impacted by poverty.

The Education Department will support and challenge schools to monitor and evaluate the impact of their approach to PEF throughout the cycle as follows:



Schools will be expected to report on the impact of Pupil Equity Funding to their Parent Council. Pupil and parent friendly versions of plans for, and reports on, the use of PEF should be made available. Head Teachers should also discuss with Trade Union colleagues their plans for the funding, in line with departmental policy on school improvement planning and DSM.

The checklist in Appendix 2 may help schools to identify the effectiveness of their approach to allocating PEF.

'...reports must be made publicly available so that parents and carers can easily access, understand and where appropriate, challenge, what is happening in their school with regard to Pupil Equity Funding.'

Effective School Improvement

Planning 2022/23

Finance

The following points should be considered by Head Teachers when making spending decisions:-

- PEF expenditure may cover staff costs (teaching and non-teaching posts), resources, equipment or services.
- Funding **must** provide additionality to core service delivery via new or enhanced activities.

- ERC HR and procurement policies and procedures must be adhered to.
- The Parent Council, DSM (Staff Consultative, including TU representatives) Committee and Pupil Council should be consulted on proposals.
- The full cost of absence cover for PEF funded posts (including long-term sickness and maternity leave) must be met from within existing devolved budgets (since no additional government funding has been provided separately for this)
- Schools should also be aware that the impact of any future pay awards for posts established from the PEF will be met from this resource.
- Teachers employed using PEF monies will be excluded from ERC's contribution towards the national commitment to maintain the pupil: teacher ratio as measured via the annual census.
- Any temporary promoted posts funded by PEF may be subject to job-sizing.
- PEF allocations will be included in the 2022/23 entitlement budget for each school under a unique ledger code. To allow monitoring of spend, a number of new ledger codes were created and once spending plans are finalised funding should be vired as appropriate to each of these new budget lines.
- Business Support Managers will have a key role in ensuring PEF costs are being recorded accurately.
- Funding will be for financial year 2022/23; any remaining balance can be carried forward but must be spent before the end of session 2022/23.
- Funding allocation will remain in place for 4 years, therefore schools must consider the potential impact of inflation and other external factors on their spending plans.