Pupil Equity Funding



National Operational Guidance 2022

A guide for headteachers and practitioners







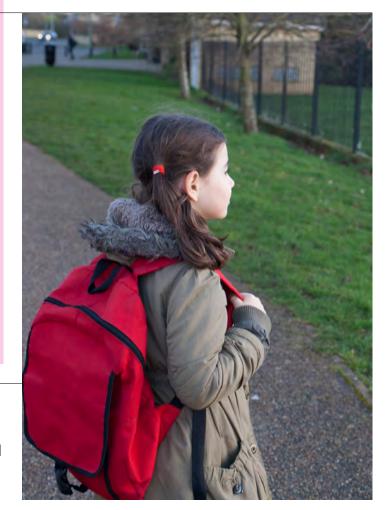
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What is Pupil Equity Funding?

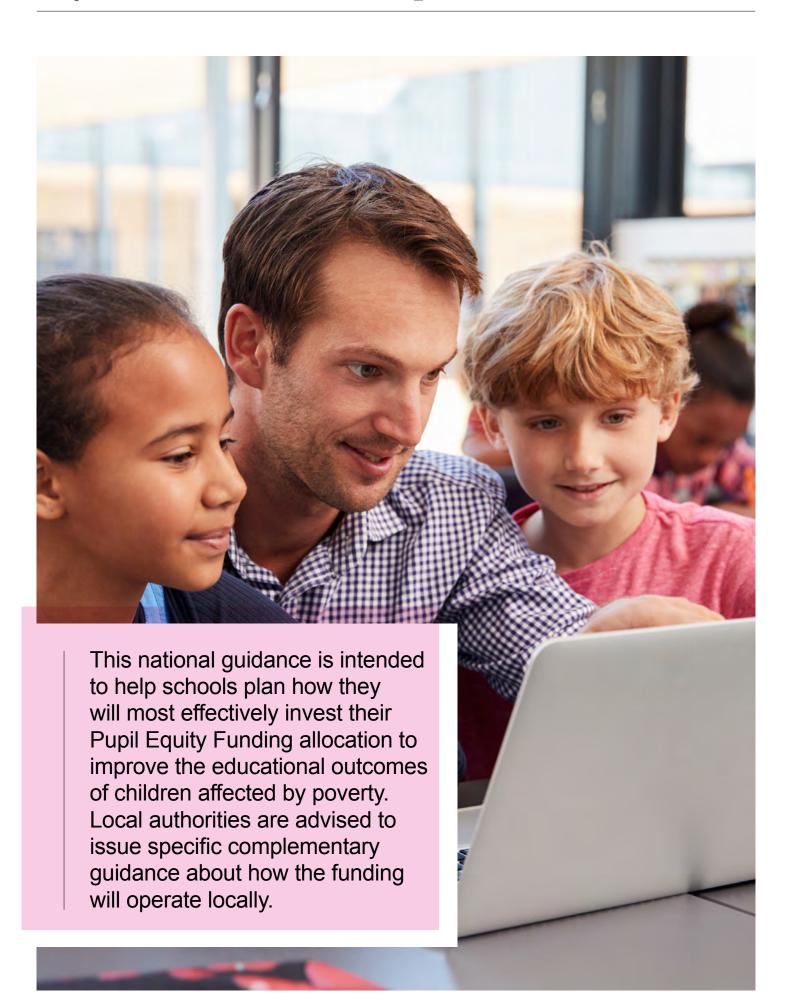
Pupil Equity Funding (PEF) is additional funding allocated directly to schools and targeted at closing the poverty-related attainment gap. The Scottish Government has committed to this funding as part of the Scottish Attainment Challenge (SAC) programme from 2017/18 up until 2025/26.

Pupil Equity Funding is part of the Attainment Scotland Fund (ASF).



In November 2021, the Cabinet Secretary for Education and Skills <u>set out plans</u> for a refreshed Scottish Attainment Challenge from April 2022. The mission of this refreshed Challenge is:

to use education to improve outcomes for children and young people impacted by poverty, with a focus on tackling the povertyrelated attainment gap.



Key Principles

- This guidance should be considered alongside the <u>Scottish Attainment Challenge Framework</u> for <u>Recovery and Accelerating Progress</u>
- Headteachers will have access to their school's full allocated amount of Pupil Equity Funding and should work in partnership with each other, and their local authority, to agree the use of the funding.
- Pupil Equity Funding must enable schools to deliver activities, approaches or resources which are clearly additional to universal local improvement plans.
- Teachers, parents and carers, children and young people and other key stakeholders should be meaningfully involved throughout the processes of planning, implementing and evaluating approaches.
- Funding must provide targeted support for children and young people (and their families if appropriate) affected by poverty to achieve their full potential, focusing on targeted improvement activity in literacy, numeracy and health and wellbeing.
- Although the Pupil Equity Funding is allocated on the basis of free school meal registration, headteachers can use their professional judgement to identify children in their school who may benefit from the targeted interventions and approaches, with the aim of closing the poverty-related attainment gap.

- Schools must take account of the statutory responsibilities of the authority to deliver educational improvement, secure Best Value, and the authority's role as employer. Local Guidance will set out more detail on how this will operate. The contributions of wider services supporting children and young people and their families are vital to supporting pupils' readiness to learn. Collaboration across services is crucial in tackling the poverty related attainment gap.
- The operation of the Pupil Equity Funding should be included within existing planning procedures e.g. through School Improvement Plans and Standards and Quality reports, or equivalent report if appropriate, each of which should be easily accessible to stakeholders. This must provide clarity to stakeholders on how Pupil Equity Funding is being used and its expected impact.
- Headteachers 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.
- 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.

Pupil Equity Funding Allocation

How much is it?

Publicly funded primary, secondary and special schools will receive an increased £1,225 in 2022/23 for each child in P1 to S3, or equivalent, who is registered for free school meals under national eligibility criteria. The allocations are fixed across four years, providing clarity to support strategic planning over that period.

The 2022/23 Pupil Equity Funding allocations can be found here:

Schools: Pupil attainment: closing the gap

How is it allocated?

Pupil Equity Funding is allocated to schools on the basis of the estimated number of children and young people in P1-S3 registered for free school meals (FSM) under the national eligibility criteria. The 2022/23 funding allocation has been calculated using the most recently available Healthy Living Survey which surveyed the take up of FSM from 2020 and Pupil Census data from 2021 and is based on:

- The estimated number of P1-P3 pupils who would be registered for free school meals using the national eligibility criteria. This was done by taking the proportion of pupils registered for FSM in primary schools in 2014 and then applying those to the 2021 school rolls for P1 to P3.
- The number of P4-P7 and S1-3 pupils who are registered for FSM.
- The estimated number of special school pupils in the P1-S3 age range registered for FSM.

 The calculation method uses 2018 Healthy Living Survey registration rates for Glasgow, and 2019 rates for Inverclyde and selected schools in South Ayrshire, to mitigate any impact from variations in local free school meal eligibility.

The use of FSM as an indicator of need should not promote overly rigid and prescriptive use of the fund. Headteachers and teachers should use professional judgement when deciding how funds are targeted to most effectively improve outcomes for children and young people affected by poverty in their schools and communities.

Funding for 2022/23 will be paid by the Government to local authorities by means of a ring-fenced grant which will clearly indicate the amounts that should be allocated directly to each school. Local authorities will be responsible for confirming arrangements for draw down at school level.

Use of Pupil Equity Funding

How can it be used?

Although the funding is allocated to schools on the basis of free school meal registrations of pupils in P1-S3, headteachers and teachers have discretion to make decisions about which children and young people would benefit most from any particular intervention or approach, whilst keeping a clear focus on delivering equity through improving outcomes for learners impacted by poverty.

Funding should not be used in ways that stigmatises children and young people or their parents and carers. Interventions that support transitions between school stages – for example between nursery and primary or between broad general education and senior phase – can also be considered.

The funding should be focused on resources, activities and approaches focussed on learners impacted by poverty, which will lead to improvements in literacy, numeracy and support health and wellbeing. Leadership; learning & teaching; and families and communities continue to be recognised as useful organisers to consider when determining interventions and approaches.



Headteachers can work at an individual school and local community level, which includes children and young people and their families, or collegiately in wider school clusters and beyond at local authority and regional improvement collaborative level to address common interests.

Consideration should be given to how the school can work with community partners beyond education to deliver proposed and collaboratively agreed aims and outcomes. Interventions and approaches should be considered within the context of the school improvement planning cycle and must be targeted towards closing the poverty-related attainment gap. Where appropriate, funding should articulate with existing Scottish Attainment Challenge improvement plans, utilising the Framework for Recovery and Accelerating Progress.

Headteachers may also want to consider the mitigations and recommendations noted in the Equity Audit and Closing the poverty related attainment gap: A report on progress 2016-2021 which were published in 2021.

The three organisers of learning and teaching; leadership; and, families and communities should shape local approaches.

Headteachers should use their discretion when deciding which pupils will benefit from Pupil Equity Funding, as well as engaging with teachers, when deciding which approaches would have the most impact for children and young people impacted by poverty. The following five key indicators may be helpful and should be taken into consideration.

- Attainment
- Attendance
- Inclusion
- Engagement
- Participation

Misconceptions

"Only children in receipt of FSM can benefit from Pupil Equity Funding"

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False. Although funding is based on free school meal registration of pupils in P1-S3, this should not necessarily exclude any children and young people outside of this range. Headteachers have flexibility when deciding which children and young people can benefit from the funding.

"Pupil Equity Funding must only be spent on interventions"

False. Interventions and approaches should be considered within the context of the school improvement planning cycle and must be targeted towards closing the poverty-related attainment gap. These approaches can include interventions, staffing and ICT, which help close an identified gap within a whole school improvement priority using additional funding or resource.

"Evidence for interventions and approaches using Pupil Equity Funding can be supported using only school data"

False. The use of school **and** learning community data is strongly encouraged. Headteachers 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.

"Pupil Equity Funding cannot be used to support education recovery"

False. The Cabinet Secretary for Education and Skills set out to Parliament on 23 November 2021 plans for the Scottish Attainment Challenge for 2022/23 to 2025/26, which includes Pupil Equity Funding. This clearly stated the aim to support recovery from the pandemic and accelerate progress in closing the gap.

Considerations for using PEF

When utilising the Framework for Recovery and Accelerating Progress to implement interventions, Headteachers and teachers should also incorporate a key set of considerations for use of the funding.

They should also consider how the plans for use of Pupil Equity Funding will support the six priority family types <u>identified by the Scottish</u>

<u>Government</u> as being at highest risk of experiencing child poverty:

- Lone parent families
- Minority ethnic families
- · Families with a disabled adult or child
- Families with a young mother (under 25)
- · Families with a child under one
- Larger families (3+ children)

Mitigate the Impact of Poverty

Mitigating the impact of poverty is an imperative in line with the refreshed mission of the Scottish Attainment Challenge, and supports The Scottish Government's Best Start, Bright Futures: tackling child poverty delivery plan 2022-26 plans. Tackling the cost of the school day can help to remove financial barriers to learning and participation for children on low incomes. It can also reduce pressure on family budgets. Focusing on the cost of the school day improves equity through better understanding of barriers faced by pupils and families affected by poverty and the development of poverty aware policies and practices.

The Cost of the School Day project at Child Poverty Action Group (CPAG) in Scotland offers resources and support for schools and local authorities on developing cost of the school day approaches, involving school communities and good practice in reducing costs, maximising incomes and supporting children and families on low incomes.

All Cost of the School Day (CoSD) information and resources can be found:

- on the CPAG website https://cpag.org.uk/cost-of-the-school-day
- CoSD Toolkit https://cpag.org.uk/scotland/CoSD/toolkit
- Talking about Costs at School https://cpag.org.uk/talking-costs
- Contact the team at costoftheschoolday@cpagscotland.org.uk.

Education Scotland has created a <u>case study</u> to highlight the impact of using PEF to address the cost of the school day. This was highlighted by HM Inspectors as effective work in improving equity and the cost of the school day.

National Parent Forum of Scotland also have a cost of the school day toolkit for parent councils – Cost of the School Day Parent Council Toolkit – National Parent Forum of Scotland (npfs.org.uk)



Equalities

Evidence shows that some children and young people from marginalised groups can be disproportionately affected by deprivation and can therefore face significant additional barriers to learning. Local authorities have responsibilities to actively address inequality, and the promotion of equity is a shared responsibility held by all staff, partners and other relevant stakeholders. Educational authorities should consider how the interests, knowledge, identities and resources of marginalised young people and communities (e.g. those from minority ethnic backgrounds or lone parent households) are being recognised and valued. The influence of unconscious bias should also be considered especially in relation to whose ideas are valued and how they influence PEF planning.

In this context, headteachers should consider additional steps that might be required to close the poverty-related attainment gap for pupils affected by poverty who may also experience disadvantage for other reasons. For example, disadvantage related to:

- a protected characteristic (disability, gender reassignment, pregnancy and maternity, race, religion or belief
- sex (gender) and sexual orientation)
- · a need for which they require additional support
- being looked after
- having caring responsibilities.

Schools should consider equalities when identifying root causes of attainment gaps – data about poverty and the Scottish Index of Multiple Deprivation should be looked at in conjunction with other key characteristics including, but not limited to, gender, race, disability, care experience, gypsy roma/traveller. This will require disaggregating data educational settings will already be collecting by these characteristics.

Staffing

Any staff recruited through Pupil Equity Funding should be additional to normal requirements. Where schools identify the need to recruit additional staff for an appropriate intervention or approach, they should work closely with the local authority (as the employer) to ensure that the job remits and specifications are clearly tied to the aims of the intervention or approach. Headteachers need to take full account of local Human Resource policies and procedures and that staffing costs include not just salaries but also on-costs such as pensions, sick leave, maternity cover and also any potential recruitment costs. Local guidance should provide further clear details of these costs.

Procurement

Purchase of resources, equipment or services must comply with existing local authority procurement procedures. This will be particularly important when buying Information and Communication Technology (ICT) resources (see below) or, for example, services from third sector partners. Schools should liaise with their relevant local authority finance partners to ensure compliance with procurement policies and legislation.

ICT

Pupil Equity Funding can be used to procure digital technologies, including hardware and software, where its allocation and use is particularly focused on supporting children and young people affected by poverty to achieve their full potential.

The Scottish Government is currently in the planning stages of the commitment to provide a device for every school aged child and intend to provide a deeper investment in the technology in 2023/24 onwards. You may wish to consider whether PEF could be used towards digital devices in 2022/23 or other whether other funding avenues would be more suitable at this stage. You should engage closely with your local authority IT department about any spend you plan to make in digital technology.

The Scottish Government provides access to a range of national procurement frameworks for the purchase of digital technology products and devices, including a range of desktops, laptops and tablets. The frameworks offer a direct route to market and significant savings against Recommended Retail Price (RRP). To prevent issues arising with compatibility and connectivity, schools seeking to purchase digital technology should do so in close consultation with the IT Department at their local authority.

We know that simply providing more technology does not result in improved outcomes for learners. Therefore, any deployment of technology in an educational setting should be undertaken in line with the objectives of the national <u>Digital Learning and Teaching Strategy</u> and any local digital planning where necessary, with clear plans in place at the outset to evaluate the impact on closing the poverty-related attainment gap from the funding.

Planning

Pupil Equity Funding allocations have been confirmed until March 2026. Opportunities to implement longer term interventions over this period can be realised with the support of confirmed annual allocations. Consideration should also still be given to shorter term interventions which support the mission to use education to improve outcomes for children and young people impacted by poverty, with a focus on tackling the poverty-related attainment gap.

Utilising a longer-term approach by planning the use of Pupil Equity Funding over multiple years may allow for more effective planning of spending, recruitment and development.

Planning can be supported by the logic model, which can be found as a supporting document to the <u>Framework for Recovery and Accelerating Progress</u>, which shows how a programme produces change. The SAC logic model can help bring detail to programme goals, aid planning, evaluation, implementation and communication. It incorporates outcomes reflecting the mission, which encompasses child poverty, broader achievement and an increased focus on health and wellbeing and family and community support.

As set out in the Framework for Recovery and Accelerating Progress, there should be alignment between aims set by schools to improve the outcomes for children and young people affected by poverty and the stretch aims of the local authority. Local authority will provide guidance on how approaches to the use of Pupil Equity Funding at school level can contribute to local aims. School plans should inform the local authority stretch aims and local authority aims should be reflected in school plans as part of a two-way collaborative process.

Headteachers will need to be familiar with local policies and procedures – such as the Local Code of Corporate Governance, Local Schemes of Delegation, the Role of the Section 95 officer, the local Devolved School Management policy and local school planning cycle. Local authorities can advise on these policies.

An 'Interventions for Equity' resource has been developed to support the planning and implementation of interventions and approaches to meet the needs of children and young people affected by poverty in order to close the attainment gap. The examples cited act as a stimulus for wider reflection of what might suit your local context and are by no means the only interventions that should be considered.

General principles for planning for Pupil Equity Funding within the Scottish Attainment Challenge



Collaborative:

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



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.



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.



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.



Evaluative:

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



Quality assurance processes embedded

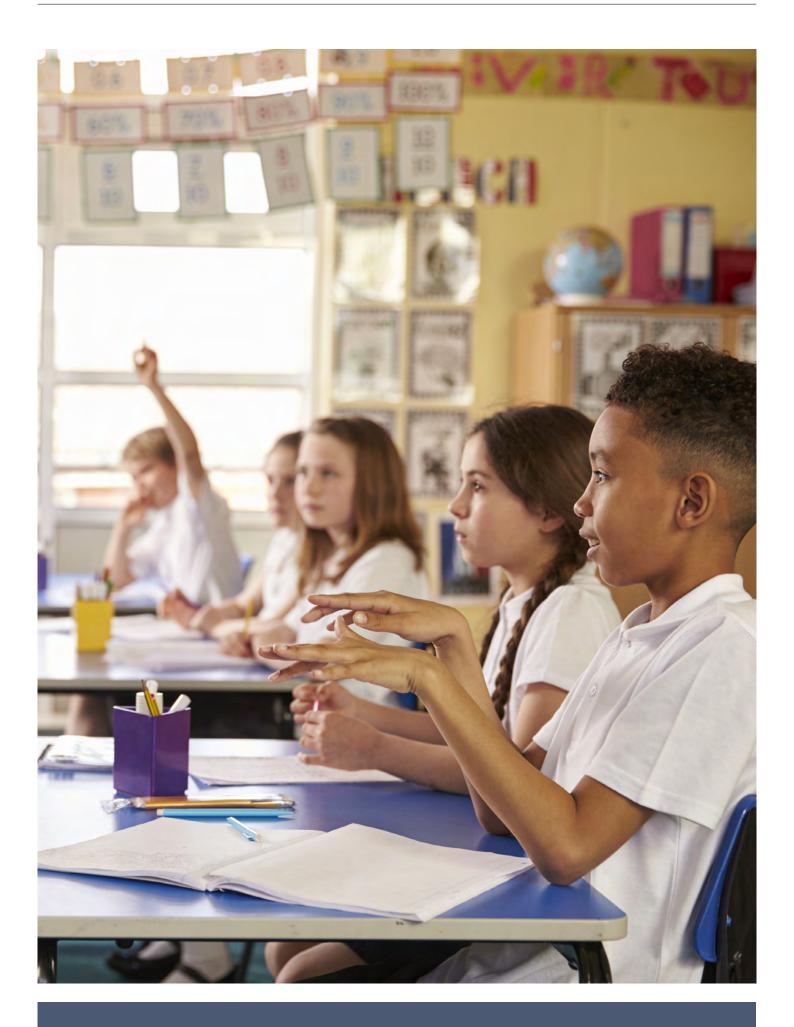
to support the development and implementation of SAC plans. This can be both internal or external, involve peers or senior leaders.

Unspent funds

Where schools are unable to spend their full allocation during the financial year, any unspent funds can be carried forward to the new financial year. The expectation is that, other than in exceptional circumstances, it should be spent within that same academic year. PEF Allocations have been confirmed over four years until March 2026, which should enable headteachers to begin to plan for how they will invest the funding over the short and longer term. There are opportunities to implement longer term interventions over this period supported by the long-term confirmation of annual allocations. However, consideration should also still be given to shorter term interventions which support the mission to improve outcomes for children and young people impacted by poverty, with a focus on tackling the poverty-related attainment gap.

Schools should liaise closely with their authority to agree arrangements for carrying forward the funding into the new financial year (and, in exceptional circumstances, into the new academic year). Pupil Equity Funding should be considered separately from other funding within the devolved school management budget.

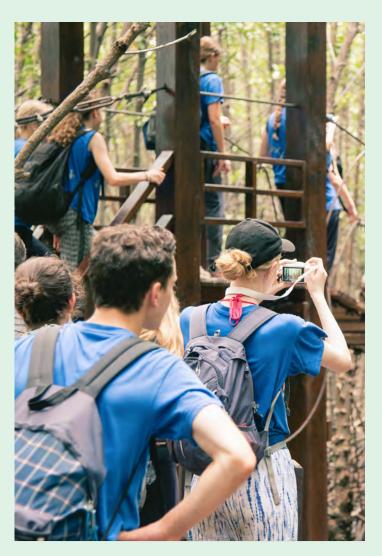
Headteachers should utilise the <u>Framework for Recovery and Accelerating Progress</u> to help shape School Improvement Plans to achieve a robust and effective plan for Pupil Equity Funding which will not result in any predicted underspend of funds. They should work in close collaboration with Attainment Advisors to ensure effective planning thereby identifying appropriate opportunities for improvement and to close the poverty-related attainment gap.



Accountability

The headteacher will be accountable to their local authority for the use of Pupil Equity Funding within their school. Schools should consult and engage effectively with teachers, parents and carers, children and young people and the wider community when implementing approaches to closing the poverty-related attainment gap.

Headteachers' responsibilities are outlined in the <u>Framework for Recovery and Accelerating Progress</u> (section 2.1). They are responsible for timely planning and reporting documents to be made available to relevant stakeholders including parents and carers and local authorities.



Partnerships

Parents and carers and the local community are a valuable source of support, expertise and experience in working with children and young people experiencing poverty-related barriers to learning. In many contexts, particularly in rural areas, schools may be able to achieve the best possible outcomes for children and young people by working with a range of bodies such as:

- parent groups
- parent councils
- other local authority and public sector services (such as community learning & development)
- third sector organisations (including youth work, family learning organisations)
- other educational sectors
- and/or centres of expertise.

Understanding the needs of children and young people will help to identify appropriate areas for collaboration.

Engaging Children and Young People and their Families

Children and young people should be involved throughout the entire process of local approaches and have the opportunity to have their views heard and influence local decision making.

Support on how to enable children and young people to have that input can be found at Resources on how to enable CYP to input to planning and evaluation.

One particular approach that headteachers can consider is participatory budgeting.

Participatory budgeting (PB) is an innovative and effective mechanism to engage with parents, carers, children and young people, in particular those who face barriers to participation within their learning community. PB directly involves people in budgeting decisions that has a direct impact on improving their lives. It can strengthen pupil voice and provide real experience of democracy in action, resulting in more confident and active young people as citizens. PB offers positive engagement experiences, strengthening the school culture by building positive relationships. PB in schools is a meaningful, practical and tangible way to realise children's rights to participate in decision making, whilst building an awareness of wider community needs.

More information about PB can be found on the PB Scotland website at: https://pbscotland.scot/pb-in-schools/resources.

For any queries contact: info@pbscotland.scot



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Reporting on Impacts

To ensure transparency, schools will be expected to incorporate details of their Pupil Equity Funding plans and explicitly report on the impact on outcomes for learners impacted by poverty. This should be done within existing local authority reporting processes to their Parent Council and Forum, including in their annual School Improvement Plans and Standards and Quality Reports.

These plans and 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. The arrangements for publication will be confirmed by the local authority.

Inspection visits and other review processes include a focus on how well schools use their Pupil Equity Funding. 'How Good Is Our School? 4th edition' includes a quality indicator to support self-evaluation of the school's success in raising attainment and achievement and ways in which schools can demonstrate improvements in the provision of equitable opportunities for all learners to succeed. This aspect is evaluated, during school inspections, using the six point scale.

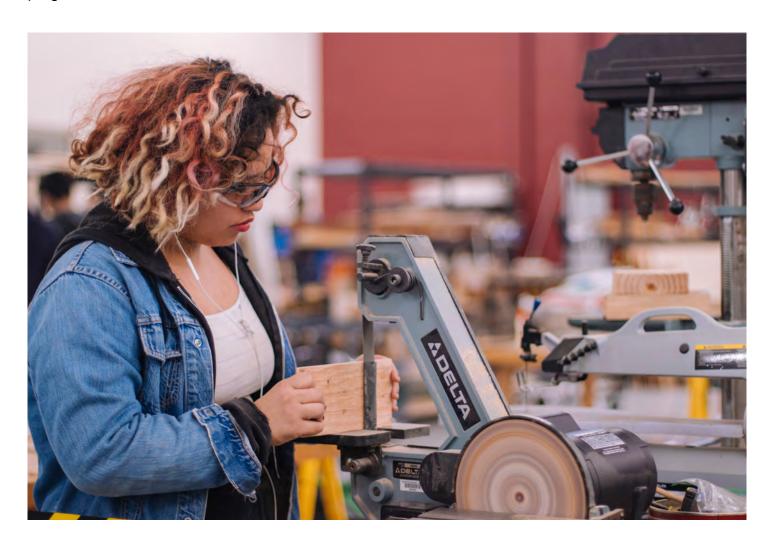
It can be helpful to promote engagement with your school to communities through engaging and innovative reporting methods, for example; some schools have highlighted how they have spent their PEF online through Twitter, Sway and other means.

In addition, the operation, use and effectiveness of the Pupil Equity Funding at closing the poverty-related attainment gap at a local authority level will feed into other existing quality assurance processes, such as Audit Scotland's Shared Risk Assessment.

Impacts and Outcomess

At a school level, it is essential that Headteachers continue to make best use of the data they have access to locally to understand which children and young people, affected by poverty-related barriers to learning, would benefit from targeted support and to monitor and track learners' progress over time. Schools should articulate clearly defined outcomes to enable progress and impact to be measured effectively. Where appropriate, consideration should be given to defining short, medium and long term outcomes to enable progress to be measured over time and to

ensure that planned approaches are resulting in improvements. Improving nationally the confidence and accuracy of teacher professional judgement of achievement of Curriculum for Excellence levels is a key factor in measuring progress. Further guidance on assessment can be found in the Key messages for schools and the Benchmarks issued in 2017. Progress towards closing the attainment gap will continue to be reported in the annual national and local National Improvement Framework evidence reports.



Resources

There is a package of national and local support available to assist schools in planning how to use their Pupil Equity Funding.

The Education Scotland report 'Pupil Equity
Funding: Looking inwards, outwards, forwards —
sharing effective practice to maximise support for
learners and practitioners' provides a valuable
resource highlighting effective practice in
planning and implementing PEF approaches.

<u>Scottish Attainment Challenge – Self-evaluation</u> <u>resource</u> designed to assist schools and others bring about further improvement at this time of recovery.

An Intervention for Equity framework of evidenced and proven educational interventions and strategies to help tackle the poverty related attainment gap. The framework can be used by all stakeholders and should help to inform the decisions schools make. The structure and content is designed to be dynamic and continues to evolve as an integral part of the National Improvement Hub, where a wide range of improvement, self-evaluation and research materials are available and where PEF practice exemplars can be shared. Other research summaries and intervention examples will continue to be incorporated as these become available.

An Education Scotland Equity Toolkit is currently being developed and is expected to be available from the summer of 2022.

<u>ILA Framework</u> to evaluate how well local authorities are improving learning, raising attainment and closing the poverty related attainment gap

A reflective tool for educators, <u>Getting It Right</u>
For All Learners during COVID-19

The Education Endowment Foundation (EEF) Toolkit provides an accessible summary of educational research designed to inform discussions on the most effective approaches to improving attainment, with a focus on 5-16 year olds and poverty disadvantage. It contains teaching approaches and interventions, each summarised in terms of their average impact on attainment, the strength of the evidence supporting them and their cost. It is useful for education leaders and practitioners to inform decision making on the use of Pupil Equity Funding, raising attainment and improving equity. Many of the strands now include challenge questions to help support professional discussions. The toolkit is intended to be used in conjunction with the range of interventions and approaches provided through the framework above to encourage and enhance professional dialogue taking full account of the local context.

Guidance on working with the third sector is available to help support schools make the best use of funding with other partners. This resource sets out how schools can create purposeful partnerships with appropriate third sector organisations to improve outcomes for children, young people and families. The third sector is particularly well placed to support improvements to health and wellbeing and to improve employability skills and school leaver destinations.

Alongside schools, youth work improves the wellbeing, readiness to learn and educational outcomes of children and young people.

YouthLink Scotland has a range of collaboration support and resources available as part of their national Scottish Attainment Challenge programme. This includes information for schools, evidence and examples of impact and learning from the Youth Work Education Recovery Fund. They can also provide support to identify and work with youth work partners.

Attainment Advisors will provide advice on a local and regional basis. Attainment Advisors can be integral to facilitating good communication between headteachers, helping to share best practice and provide guidance on effective planning, implementation and evaluation of interventions in schools, local authorities and Regional Improvement Collaboratives.

Examples of this include Attainment Advisors:

- working with headteachers, senior leaders and practitioners to support joint planning and development of collaborative approaches to the use of Pupil Equity Funding
- providing advice and support to Headteachers on planning and reporting on initiatives and the use of impact evaluation data and evidence to identify successful approaches and areas for improvement

- supporting review of local authority SAC self-evaluation frameworks and approaches and providing advice on how this could be expanded to include work related to Pupil Equity Funding and wider Attainment Scotland Funding, including Strategic Equity Funding and Care Experienced Children and Young People Funding.
- highlighting opportunities for collaboration and use of communication tools on Glow including the Scottish Attainment Challenge community, Teams, Yammer, Sharepoint, and Blogs.

These tools all ensure educators can have online discussions, ask questions, post responses, exchange ideas, access additional resource materials and share examples of practice across the Scottish Attainment Challenge, with the ability to host regular discussions and securely connect and network practitioners where required.

Guidance on School Improvement Planning including Standards and Quality reporting from Education Scotland. Local authorities will also offer their own packages of support for schools to help them plan how to use the funding effectively.

- More guidance can be found for Primary schools and early learning and childcare here: https://education.gov.scot/media/0qid0vsw/ data-guide-primary-and-elc.pdf
- Secondary schools guidance is here: https://education.gov.scot/media/ca3c2gki/data-guide-secondary.pdf

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