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REPORT TO: Members' Library Service

MEETING DATE:

BY: Depute Chief Executive (Resources and People Services)

SUBJECT: Pupil Equity Fund

1 PURPOSE

- 1.1 The purpose of this report is to provide Members with an update on how schools are using the Pupil Equity Funding allocated by the Scottish Government.

2 RECOMMENDATIONS

- 2.1 Members are asked to note the content of the report.

3 BACKGROUND

- 3.1 The Pupil Equity Funding (PEF) is additional funding from The Scottish Government allocated directly to schools to be targeted at closing the poverty related attainment gap. The Scottish Government committed to this funding as part of the Scottish Attainment Challenge programme from 2017-18. The PEF funding forms part of the £750 Attainment Scotland Fund which will be invested over the current Parliamentary term.
- 3.2 The PEF funding has been paid by the Scottish Government to local authorities by means of a specific grant with indicative amounts that should be allocated directly to schools. The amount allocated to each school has been calculated according to the number of children and young people in P1 – S3 who are eligible to be registered for free school meals. The funding for 2017/18 was announced in January 2017 with a total amount of £1,569,600 allocated to East Lothian Council across almost all schools. Amounts allocated to each school varied considerably from £2,400 to over £100,000. The funding for 2018/19 was announced in February 2018, with a total amount of £1,565,160 allocated to East Lothian schools. Information on the allocation of PEF funding per school for 2017/18 and for 2018/19 is set out in Appendix 1 and 2.

- 3.3 The PEF fund comes with a number of conditions. These include:
- Pupil Equity Funding must be clearly additional to that which would otherwise have been allocated to the 2018/19 education budget. Pupil Equity Funding should not substitute or compensate for any spending reductions which arise from Local Authority budget efficiency savings.
 - The funding allocations must be made available to schools in full, with no upfront top-slicing at authority level, although the Government recognises that there may be additional corporate costs for the Grantee – for example, those relating to HR, procurement, ICT etc. – which can reasonably be reflected in costs passed on to schools. These costs should be proportionate and consistent with the Grantee’s approach to securing Best Value.
 - Pupil Equity Funding must provide targeted support for children and young people affected by poverty to achieve their full potential. Although the funding is allocated on the basis of free school meal eligibility, Head teachers can use their professional judgement to bring additional children in to the targeted interventions.
 - Teachers whose posts are funded by Pupil Equity Funding will be additional to those which contribute to the Grantee’s pupil:teacher ratio commitment agreed separately with Scottish Government and so will not contribute to the delivery of that commitment.
 - Head Teachers are expected to work in partnership with each other, and the local authority, to agree the use of the funding. Parents and carers, children and young people, and other key stakeholders should be involved in this process.
- 3.4 The Scottish Government, working with Education Scotland has provided national guidance on how the additional funding should be used. East Lothian Council Education Service has provided additional support and guidance to schools to help them to determine how best to use this additional funding (Appendix 3).
- 3.5 When developing their plans, Head Teachers are expected to consult fully with children, young people, staff, parents and the wider community.
- 3.6 School plans for PEF are expected to be based on robust evidence gathered from their ongoing self-evaluation, specifically focussed on the poverty-related attainment gap and which interventions are to be used to address it.

Use of PEF Funding

- 3.7 The majority of schools have chosen to provide additional staffing to provide a range of support and targeted interventions. This has included additional teachers, pupil support assistants and other support staff.

Information on the range of interventions planned in 2017/18 are provided (Appendix 1).

- 3.8 A range of Council Service areas have also been closely involved in supporting the implementation of PEF, for example, Finance, Procurement, HR, Data analysis, Education Psychology Services and Quality Improvement. In some cases, this additional workload has had a significant impact on existing workload.
- 3.9 Despite the significant planning and support put in place, a number of schools have had difficulty in implementing the range of interventions planned for 2017/18. In most cases, these relate to difficulties recruiting appropriate staff to fulfil specific roles. As a result, schools have revised their plans mid-year to take account of the difficulties with recruitment.
- 3.10 Given that a number of interventions have been delayed, a number of schools have not yet been able to spend their full PEF allocation. This picture is similar to that being reported across Scotland. As a result, the Scottish Government has provided guidance for schools to carry forward their PEF allocation in the next financial year.

Impact of PEF

- 3.11 The impact of PEF and the success of interventions is reported through the school Standards and Quality/School Improvement Planning process. During session 2017/18, the Quality Improvement Team have been engaging with individual schools and groups of schools on the impact of PEF.
- 3.12 Schools are currently reflecting on the use of PEF across 2017/18 and using their evaluations of the successes and challenges to work with pupils, staff, parents and the community to plan the use of PEF for 2018/19. Where Head Teachers have reported some success with their interventions, they are looking to build on these successes and also to build sustainability. Where there have been challenges, for example through staffing, Head Teachers are revising their plans, supported by their Quality Improvement Officer, to ensure their interventions will have the greatest chance of success for children, and their families.
- 3.13 Whilst it is still too early to fully determine the impact of PEF in year 1, the Education Service has reported some early successes. One secondary school has successfully introduced nurturing approaches which has ensured that young people are engaging more positively in their learning in class. Another secondary school has had a strong focus on young people's health and wellbeing. This is beginning to have a positive impact for young people in terms of their engagement in their learning and also their self-esteem. One primary school has worked extensively on the use of data to understand the attainment gap. A wide range of literacy, numeracy, health and wellbeing and nurture interventions are in place and to date, there is notable progress in children's learning overall.

- 3.14 Reporting on the impact of PEF continues to be a challenge for Head Teachers, especially where there is not yet robust data to reliably measure progress. The Quality Improvement Service and groups of Head Teachers have worked closely with the Education Scotland Attainment Advisor for East Lothian to look at identifying the attainment gap and also in measuring the impact of interventions. This work will be developed further in 2018/19.
- 3.15 The school review process in primary and secondary schools has a focus on the Management of Resources and use of PEF. School inspections also now focus on schools' success in raising attainment and achievement and ways in which they can demonstrate improvements in equity for all learners.
- 3.16 Education Scotland has recently introduced inspections of those Local Authorities who are 'Attainment Challenge Authorities'. These inspections have a strong focus on how local authorities are closing the poverty related attainment gap. While these start with the aforementioned Challenge Authorities there is an understanding that they may be extended to all 32 local authorities. The Education Service Quality Improvement Manager is a Professional Associate and may be deployed as a team member on a local authority inspection later this year.

4 POLICY IMPLICATIONS

- 4.1 None

5 EQUALITIES IMPACT ASSESSMENT

- 5.1 The subject of this report does not affect the wellbeing of the community or have a significant impact on equality, the environment or economy.

6 RESOURCE IMPLICATIONS

- 6.1 Financial – Scottish Government has provided Pupil Equity Funding of £1,569,600 for financial year 2017/18. A further £1,565,160 has been provided for financial year 2018/19. This has been allocated to schools as additional funding.
- 6.2 Personnel – new temporary employment opportunities have arisen as schools have used this new, additional funding, where possible, to recruit new teaching and support staff. All recruitment has been in line with Council policy, supported and processed through central Education and HR teams.
- 6.3 Other - none

7 BACKGROUND PAPERS

7.1 Pupil Equity Funding (PEF): national operational guidance 2018

<https://beta.gov.scot/publications/pupil-equity-fund-operational-guidance-2018/>

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DATE	21 May 2018

Pupil Equity Fund Overview

September 2017

(Appendix 1)

School	Allocation	Planned actions and interventions
Aberlady Primary	£6000	Outdoor activities support Metacognition and self-regulation strategies Literacy support – Early intervention
Athelstaneford	£7200	Support for Learning Literacy support - reading and spelling Numeracy resources
Campie Primary	£57600	Enhanced pastoral support Family Learning Programmes
Cockenzie Primary	£33600	Data analysis Nurture
Dunbar Primary	£97200	Literacy support – early intervention Numeracy intervention at P4/5
Dirleton Primary	£8400	Fresh start approach to reading Numeracy academy approach to pedagogy Supported trips and residentials
East Linton Primary	£15600	Improve pedagogy – Literacy and Numeracy Targeted support
Elphinstone Primary	£10800	Early intervention – Literacy and Numeracy Nature nurture Family learning
Gullane Primary	£12000	Early intervention – Literacy and Numeracy
Haddington infant	£43200	Targeted support for Literacy and Numeracy Introduce Visible Learning
Innerwick Primary	£7200	Targeted support for Literacy and Numeracy
King's Meadow Primary	£28800	Nurture
Longniddry Primary	£2400	Deliver 'Emotion Works'
Loretto Primary	£28800	Targeted Literacy and Numeracy support
Law Primary	£31200	Nurture
Macmerry Primary	£21600	Targeted support for literacy and numeracy Family support and liaison

Pupil Equity Fund Overview

September 2017

(Appendix 1)

Musselburgh Burgh	£84000	Nurture Support for Learning
Ormiston	£24000	Maths recovery Language development – early interventions Family learning
Pencaitland Primary	£6000	Improve numeracy pedagogy Parental involvement
Pinkie St Peters	£111600	Increase levels of engagement Developing a broader curriculum – creativity Nurture Literacy intervention and support
Prestonpans infant	£106800	Raising attainment Family learning Numeracy support – nursery PE
Prestonpans Primary	£73200	Nurture Breakfast club
Saltoun Primary	£6000	Developing play Resilience Digital Learning
Sanderson’s Wynd Primary	£99600	Nurture Support for Learning for Literacy and Numeracy Speech and Language Targeted support Breakfast club
St Gabriels Primary	£27600	Targeted support for literacy Nurture
St Martin’s Primary	£32400	Targeted interventions and support – literacy, numeracy, health and wellbeing Inclusion
St Mary’s Primary	£10800	Numeracy and Literacy support Loose parts play
Stenton Primary	£2400	Additional support for numeracy

Appendix 1

School	Allocation	Planned actions and interventions
Dunbar Grammar	£42000	Targeted intervention to improve attainment
Knox Academy	£24000	Targeted support for Literacy Nurture
Musselburgh Grammar	£85200	Nurture Health and Wellbeing Intervention Employability Attainment
North Berwick High School	£21600	Literacy interventions Support for SEBN
Preston Lodge High School	£63600	Intensive literacy support programme SRA Cognitive theory Targeted interventions
Ross High School	£70800	Nurture Intensive literacy and numeracy interventions Health and Wellbeing

Pupil Equity Fund Allocations 2018/19

Aberlady Primary School	£5,400	Prestonpans Infant and Nursery School	£104,400
Athelstaneford Primary School	£7,200	Prestonpans Primary School	£65,880
Campie Primary School	£55,200	Saltoun Primary School	£6,000
Cockenzie Primary School	£34,800	Sanderson's Wynd Primary School	£110,400
Dirleton Primary School	£7,560	St Gabriel's RC Primary School	£28,800
Dunbar Primary School	£94,800	St Martin's Primary School	£38,400
East Linton Primary School	£14,040	St Mary's RC Primary School	£9,720
Elphinstone Primary School	£10,800	Stenton Primary School	£2,160
Gullane Primary School	£10,800	Stoneyhill Primary School	£17,280
Haddington Infant School	£45,600	Wallyford Primary School	£79,920
Humbie Primary School	£0	West Barns Primary School	£9,600
Innerwick Primary School	£6,480	Whitecraig Primary School	£37,200
King's Meadow Primary School	£37,200	Windygoul Primary School	£87,480
Law Primary School	£28,080	Yester Primary School	£22,800
Longniddry Primary School			£6,000
Loretto RC Primary School	£25,920	Dunbar Grammar School	£46,800
Macmerry Primary School	£19,440	Knox Academy	£25,200
Musselburgh Burgh Primary School	£75,600	Musselburgh Grammar School	£76,800
Ormiston Primary School	£22,800	North Berwick High School	£25,200
Pencaitland Primary School	£5,400	Preston Lodge High School	£62,400
Pinkie-St Peter's Primary	£120,000	Ross High School	£75,600



Pupil Equity Funding- Implementation Framework East Lothian Council 2017/18

Introduction – What is it?

The Scottish Attainment Challenge was launched in February 2015 to bring a greater sense of urgency and priority for everyone involved in Scottish education to relentlessly focus their efforts on narrowing the poverty-related attainment gap at all levels and in all sectors. The Challenge has been introduced to focus and accelerate targeted improvement activity in literacy, numeracy and health and wellbeing. It also supports and complements a broader range of initiatives and programmes to ensure that all of Scotland's children and young people reach their full potential.

As part of this programme, Pupil Equity Funding (PEF) has been provided by the Scottish Government to raise attainment amongst those children and young people who face barrier to their learning due to the impact of poverty. PEF has been allocated based on the numbers of children and young people from P1 to S3 in each primary, secondary and special school in Scotland on the basis of free school meal eligibility (FSM). A total of £1.5 million of funding has been made available to 41 East Lothian schools for financial year 2017/18; it is expected that this will be available each year for duration of the current administration.

Key Principles

- Headteachers will have access to the full amount of funding allocated to them.
- The funding will be used to deliver activities, interventions or resources that are clearly additional to those which were already planned.
- The Headteacher will be accountable to their Local Authority for the use of the funds.
- Schools will take account of the statutory responsibilities of the Local Authority to deliver educational improvement and secure best value; the Authority's role as an employer must also be respected.
- Headteachers will work at an individual school and community level or collegiately with other schools or cluster of schols.
- Funding will be used to provide targeted support for children and young people affected by poverty (as defined by FSM eligibility) to acheive their full potential whilst keeping a clear focus on equity. Headteachers can use their professional judgement to bring additional children into the targeted interventions.

- Parents and carers, children and young people and other key stakeholders will be involved in the planning process.
- Headteachers must base their use of funds on a clear contextual analysis which identifies the poverty related attainment gap in their school and, plans must be evidenced in what is known to be effective at raising attainment for children affected by poverty.
- Schools will have plans in place at the onset to evaluate the impact of the funding.
- School inspection and review process will be used to ensure appropriate use and monitoring of funding. The 'How Good Is Our School?' will be used to self evaluate progress in raising attainment and achievement which has led to improvements in equity for all learners.

Planning for Improvement: Use of Pupil Equity Funding

Funding should be focussed on activities and interventions that will lead to improvements in literacy, numeracy and health and wellbeing.

The guidance provided in the recent [Driving Excellence and Equity: Advice on School Improvement Planning 2017/18](#), together with HGIOS and HGIOELC gives essential advice to schools about creating a meaningful improvement plan in line with the key priorities of the National Improvement Framework (NIF) which are:

- Improvement in attainment, particularly in literacy and numeracy;
- Improvement in children and young people's health and wellbeing; and
- Improvement in employability skills and sustained positive school leaver destinations for all young people.

Planning for the use of PEF should be integrated within this framework. Planning will be integrated into ongoing self-evaluation and school improvement planning processes which will include robust measures of impact and progress.

Step 1 – Identify Gaps

In selecting the most impactful Interventions and approaches that will contribute towards addressing the poverty related attainment gap in any given context it is essential to identify the targeted group of children or young people. How do we do this? Schools need to identify the barriers to learning for pupils as a result of poverty and analyse the impact on pupil attainment. Barriers may include factors such as poor attendance, narrow experience of life outside school, poor parenting, being a young carer, and being care experienced. Analysing these barriers against school performance data and other evidence will help to identify more precisely where progress needs to improve for pupils who are underachieving as a result of poverty, factors that may be hindering that progress and where and what kind of additional support is required.

Some pupils who may be living in poverty may not be falling behind their peers academically. In these cases schools should ensure that the relevant pupils are clearly identified on the school's tracking system so that evidence of their performance is clear;

document how whole school initiatives to raise attainment will impact on these pupils; use PEF to raise aspirations and access to opportunities if appropriate.

- Complete an in-depth analysis of the barriers to learning in your local context
- Scrutinise existing data to ensure decision making is based on data and evidence of where the gaps are in your local context
- Seek the views of parents/carers and stakeholders

Step 2 - Identify Outcomes and Success Criteria

Once barriers have been identified and schools know the group of pupils they wish to target attention must then be given to the equity focussed outcomes they are hoping to achieve. Consideration needs to be given to the long term outcomes outlined in the NIF however more specific, equity focussed outcomes should be identified. These may include: raising attainment of the bottom 20% of learners in literacy and/or maths; improving attendance/reducing exclusion of pupils in the bottom SIMD bands; increase positive destinations for pupils who have been care experienced; increase parental engagement for pupils living in bottom SIMD bands.

It may be useful to evaluate current interventions and strategies. Consider for example, how much funding is currently being used on whole school interventions versus targeted interventions; how much is being deployed across classes/stages? what early interventions are currently in place? what partnerships are already in place? what impact are they having? There are no right or wrong answers but a full analysis of current spend and interventions may help inform decisions about how to use PEF.

Against each of the desired equity focussed outcomes schools should set one or more success criteria which should be measurable, achievable, realistic and timed.

- Consider and clearly articulate the outcomes that are expected to be achieved taking into account your local context (e.g. size of school, amount of PEF, stakeholders views)
- Have a clear understanding of how success will be measured giving specific details of the changes in the data expected and the ways in which this will be measured

Step 3 - Identify What Works and Decide What to Take Forward

Schools need to look outwards for evidence of what works whilst being mindful that ...in education, “what works?” is not the right question because everything works somewhere and nothing works everywhere. So what’s interesting, what’s important in education is: “under what conditions does this work?” Dylan William, 2017.

It is important to identify interventions that can be targeted at the children and young people who are most disadvantaged (see Appendix D). Schools need to use the evidence gathered and make decisions on what would be the best approach to use in their context. These

interventions should not be seen in isolation to other efforts to raise attainment and achievement.

Consideration should be given to working in partnership with other schools, sharing practice and building capacity. Other partnerships should also be considered, such as with local third sector partners, for example, to support family learning or health and wellbeing. Some examples of local partners and providers have been documented in Appendix E.

When developing proposals, schools should consider the feasibility of their plans taking into factors such as procurement and recruitment timescales. See Appendix B (recruitment) and Appendix C (procurement) for further information.

- Consider a wide range of evidence and interventions – consult with a range of stakeholders and colleagues
- Seek out excellence practice in other schools – whilst always being mindful of your context
- Access reliable and up-to-date sources on what works in raising the attainment of disadvantaged children (see Appendix D)
- Consider the scale and sustainability of possible interventions and approaches - be mindful of recruitment and procurements processes

Step 4 – Create Action Plan

In their plan, schools, with the support of their Local Authority, should identify the issue to be addressed, and the target group or groups of pupils most in need of additional support based on an analysis of local evidence and data. Schools should ensure that they focus on a small number of specific aspects of literacy, numeracy or health and wellbeing. They should choose which aspects will best meet their pupils' needs, based on an analysis of their context, their school improvement plan and the current evidence base. Whilst a particular focus may overlap with other areas, there should be a clear rationale for why they have chosen this approach, with clear methodology to measure impact in this area.

Impact should be considered in terms of the desired outcomes for pupils and how progress towards these will be measured over time. Improvement plans should include consideration of how data will be collected and reported. Establishing baseline measures and clearly articulated outcomes and measures of impact is necessary in defining progress and next steps for targeted individuals and group.

The Education Endowment Foundation has produced a DIY Evaluation Guide to support teachers and schools in designing and carrying out small-scale evaluations in schools - [https://v1.educationendowmentfoundation.org.uk/uploads/pdf/EEF_DIY_Evaluation_Guide_\(2013\).pdf](https://v1.educationendowmentfoundation.org.uk/uploads/pdf/EEF_DIY_Evaluation_Guide_(2013).pdf) (see Appendix D). Advice on evaluation can also be sought from the Educational Psychology Service.

A template is provided in Appendix A which should be used to set out details of the proposed Action Plan. This is the paperwork that needs to be submitted to the Local Authority Planning and Support team before funding will be released to schools.

- The funding seeks to deliver improvements to educational attainment and specifically targeting to reduce the impact of poverty on attainment outcomes.

- Funding may cover staff costs, logistics, resources or services. The funding cannot be used for capital expenditure.
- Funding must provide additionality to core service delivery in new or enhanced way.
- Targeted deliverables in outputs such as hours of activity, numbers of pupils, parental involvement etc. are required.
- Targeted outcomes should be specified: for example, attainment levels, attendance, exclusions, positive destinations.
- Parent and Pupil Council's should be consulted on the proposed plan. Ensure your plan and report is accessible all groups and that they have a forum to discuss the information provided.

Step 5 - Reporting on Outcomes and Impact

Schools will incorporate details of the PEF into all existing reporting processes such as SIP and Standards and Quality reporting. It is essential that frequent evaluation of progress towards targeted outcomes is considered. Frequent updates should also be provided to Parent Councils and Quality Improvement Officers.

Where the impact of the interventions put in place may have been negligible, look at the data carefully to establish the reasons for this and then construct a new plan to ensure that this is rectified moving forward.

- The PEF plan should be incorporated into the school SIP
- Regular evaluation of progress towards outcomes must be considered. Encourage all staff to monitor the impact of the intervention via staff discussions, regular feedback slots, parental surveys etc.
- Targeted outcomes should be specified: for example, attainment levels, attendance, exclusions, positive destinations.
- Intervene quickly where any strategy or intervention fails to show impact

East Lothian PEF Planning and Support Team

The PEF Planning and Support team will consider all proposals and offer support and guidance. The group will include Education staff (QIO, EP) and HR/Finance/Procurement colleagues. The purpose of this group will be to make links to activities across the Local Authority and to ensure the plan being proposed meets national and local terms and conditions of staffing and expenditure is compliant with procurement regulations.

Timeline

- Framework issued 29th March 2017 at Headteachers conference
- Discussion and exploration for collaborative working should take place at a school and cluster level with regards to the proposals that will be submitted.

- Proposals to be submitted PEF Local Authority Planning and Support team (please email to Alison Thomson, Senior Business Support Officer athomson1@eastlothian.gov.uk). **Dates to be decided.**
- The PEF Local Authority Planning and Support team will meet early May and August to discuss proposals; feedback and support will be given to schools with regards to how to proceed.
- Implementation should start as soon as possible following the release of the funds to schools.

Appendices (stored on Education Exchange/Pupil Equity Funding)

Appendix A – PEF Proforma

Appendix B – Recruitment

Appendix C – Procurement

Appendix D – Resources to Support Evidence Based Practice

Appendix E – Examples/Contacts

