

Report

Report to:	Education Resources Committee
Date of Meeting:	5 March 2024
Report by:	Executive Director (Education Resources)

Subject:	Equity-Strategic Equity Fund (SEF)
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1. Purpose of Report

1.1. The purpose of the report is to:-

- ◆ provide an update on South Lanarkshire Council's Strategic Equity Fund (SEF) plan for 2022/23
- ◆ provide an overview on South Lanarkshire Council's Strategic Equity Fund plan for 2023/24 and a more general update around work designed to close the poverty related attainment gap

2. Recommendation(s)

2.1. The Committee is asked to approve the following recommendation(s):-

- (1) that the progress made during year, 2022/2023 on the use of the Strategic Equity Fund to reduce the poverty related attainment gap be noted; and
- (2) that the plan outlined for year 2, 2023/2024, on the use of the Strategic Equity Fund to enable schools and services to continue to take forward the challenge of reducing the poverty related attainment gap experienced by some pupils, is noted.

3. Background

3.1. It is an established fact that poverty has an impact on school attainment. The most recent figure (June 2023) indicates that 'just over 14,000, 23%, of children in South Lanarkshire live in relative poverty once housing costs have been taken into account'. Campaign to End Child Poverty/ End Child Poverty Coalition (ECPC).

3.2. In South Lanarkshire Council Schools:-

- ◆ 19.7% of learners live in SIMD1 or SIMD2 areas (2023/24)
- ◆ 21.5% are Free School Meal entitled (based on P6-7 pupils for 2023/24)

This compares nationally to:-

- ◆ 22.7% of learners live in SIMD1 or SIMD2 areas (2022)
- ◆ 21.4% are Free School Meal entitled (based on P6-7 pupils only - Healthy Living Survey 2022)

3.3. Education Resources is firmly committed to supporting young people overcome any disadvantage which arises as a result of being born into poverty, not just in attainment, but in their everyday lives. Education Resources recognise it is part of a much wider Council ambition to help children and young people and their families.

- 3.4. The Scottish Attainment Challenge (SAC) was established in February 2015 by the Scottish Government to promote equity in education through streams of additional funding. SAC is an umbrella term used to describe the full allocation of monies provided to schools and other agencies to help tackle the poverty related attainment gap. The part of this funding model which directly supported local authorities was reviewed during Session 2021/2022 and was re-launched on 30 March 2022 with a new title of Strategic Equity Funding (SEF). It described the fund of £43 million to be shared by all 32 local authorities to invest in approaches to achieving the mission of the Scottish Attainment Challenge.
- 3.5. Funding from SEF is an addition to the overall Education Resources budget. However, it can, and should not, be viewed in isolation from existing plans, policies and resource allocations e.g. additional staffing through recovery monies.
- 3.6. This Committee paper refers to a more comprehensive document attached as **Appendix 1, South Lanarkshire Council's Strategic Equity Fund 2023**, which is a comprehensive plan written by Education Resources to support the planning and implementation of SEF.

4. Funding Landscape Prior to April 2022

- 4.1. Prior to April 2022, there have been two funding streams pertinent to schools, one being the Schools' Programme (SAC) and the other being Pupil Equity Funding (PEF). In addition, some Local Authorities (but not South Lanarkshire Council) were deemed "Challenge Authorities" and received central funding, more in line with the new policy. A separate but related fund to support Care Experienced Young People was also allocated to each local authority.
- 4.2. Scottish Attainment Challenge (SAC)
20 South Lanarkshire Schools were directly supported by funding from the SAC Schools' Programme over a five-year period, up to and including session 2021/2022. These schools made bids directly to the Scottish Government for a share of SAC Programme funding. In session 2021/2022, a total of £1,772,404 was allocated across these 20 schools with an additional £179,725 allocated centrally to support the programme.
- 4.3. Pupil Equity Funding (PEF)
Since 2017, PEF funding has been a source of direct funding to almost all schools across Scotland. Within South Lanarkshire Council, 99% of schools receive yearly PEF allocations based on the percentage of children on their roll who are entitled to Free School Meals. A small percentage of each school's PEF allocation is allocated using the principles and practices of Participatory Budgeting (PB). There are no changes to National Policy on the allocation and use of PEF monies.

5. Funding Landscape Post April 2022

- 5.1. The SAC Schools' Programme ceased in April 2022 and was replaced by a new funding model, known as the Strategic Equity Fund (SEF) which distributes SAC funding across all local authorities in Scotland in line with Children in Low Income Families data. This new approach was formally launched on the 30 March 2022 with accompanying support materials for schools and local authorities.
- 5.2. Each local authority was given details of the funding that would be allocated to them for the next four years through a grant model. South Lanarkshire Council received £1.47M central SEF funding for session 2022/2023. This is the allocation for 2023/24 also, after which it increases by 26% in 2024/2025 with a further increase of 33% for

2025/2026 taking the total funding for the year to £2,274,577. **Appendix 1, page 52** gives further details on the funding landscape for session 2023/2024.

6. SEF Planning from April 2022

- 6.1. Given the information above on the national change to the funding landscape, there was a requirement to carefully plan for, deliver, spend and report on our SEF allocation from April 2022 and beyond.
- 6.2. Working within our existing planning structures, Education Resources needed to take a more centralised approach and extend the reach and impact of the available monies through judiciously planned projects, funded by SEF. The overall aim was to make the biggest difference to our children and young people who are most disadvantaged by poverty. In doing so, new National Guidelines on the parameters set around SEF have been referenced and followed, details provided in link below:
[Strategic Equity Fund -National Operational Guidance 2023](#)

7. Project planning

- 7.1. A full Strategic Equity Fund Plan was written for 2022/2023 which aligned with the Scottish Government guidance. The plan was centred around 5 key workstreams;
- ◆ Pedagogy
 - ◆ Learner Engagement
 - ◆ Strengthening Relationships
 - ◆ Curriculum
 - ◆ Learner Pathways
- 7.2. A full Strategic Equity Fund Plan, detailed in **Appendix 1**, has now been written for year 2 and builds on the work of our year 1 plan. The plan continues to be centred around the same 5 key workstreams. Details of the year 2 projects to support each workstream can be found within **Appendix 1 pages 18-50**.

8. South Lanarkshire Progress During 2022/2023

- 8.1. Stretch aims for primary school data (Achievement of a Curriculum for Excellence Level (ACEL)) were initially set for 2022/2023 as part of the year 1 Strategic Equity Fund plan. Progress to date using local and national data, including published Curriculum for Excellence Levels (ACEL) from December 2023, demonstrate that:-

P1/4/7 Literacy Combined

- ◆ South Lanarkshire Council performed as 15th out of 32 local authorities in Scotland
- ◆ At 73.4% we are above the national average of 72.7% for P1/4/7 literacy
- ◆ This demonstrates a year on year improvement and is our highest performing year since the pandemic (**Appendix 2**)
- ◆ We have overtaken our planned stretch aim for 2022/2023 of 71.8% for P1/4/7 literacy
- ◆ The literacy gap between pupils from the most (Quintile 1) and least deprived areas (Quintile 5) who achieved their expected level in literacy has narrowed and is at our lowest since 2020/2021 and since the pandemic (**Appendix 2**)

P1/4/7 Numeracy

- ◆ South Lanarkshire Council performed as 12th out of 32 local authorities in Scotland
- ◆ At 81.6% we are above the national average of 79.6% P1/4/7 numeracy
- ◆ This demonstrates a year on year improvement and is our highest performing year since the pandemic (**Appendix 3**)

- ◆ We have overtaken our planned stretch aim for 2022/2023 of 80% for P1/4/7 numeracy
- ◆ The numeracy gap between pupils from the most (Quintile 1) and least deprived areas (Quintile 5) who achieved their expected level in numeracy has narrowed and is at our lowest since 2020/2021 and since the pandemic (**Appendix 3**)

8.2. Although initial cohort based SQA data looks positive, Senior Phase Stretch Aims can only be updated in March 2024, when 2022/2023 school Leavers' data is published. Senior Phase Stretch Aims will be reported along with the annual Insight Update.

8.3. In addition to setting stretch aims and to support closer monitoring of our project plans, we also set our own internal outcomes and measures for 2022/23. Outcomes and measures were set for each project to support monitoring of impact. Evaluation for the 2022/2023 outcomes and measures can be found in **Appendix 1, pages 55-71**.

9. Strategic Equity Fund Stretch Aims for 2023/24

9.1. The stretch aims for 2023/2024 are now required to set out ambitious year on year targets for progress by the end of the three year period of 2023/2024 to 2025/2026. Core and National measures continue to be in place for session 2023/24. Further information can be found in the following document:

[Framework for Recovery and Accelerating Progress 2023](#)

9.2. For session 2023/2024 our Core measures (set Nationally) are as follows:

- ACEL Primary – literacy – P1, P4 & P7 combined
- ACEL Primary – numeracy – P1, P4 & P7 combined
- SCQF level 5 or above – All SCQF Awards
- SCQF level 6 or above – All SCQF Awards
- Leavers Positive Destinations (Participation measure)
- HWB measure (attendance)

In addition, our Core Plus measures (set locally) are

- Initial Positive Destinations
- Reduction in number of S4 leavers
- Cost of School Day measure

Further information on these measures, including details of our stretch aims for 2025/2026 are detailed within **Appendix 1 pages 10-15**.

9.3. Outcomes and measures have again been set for 2023/2024 and will help with our ongoing evaluation of the workstreams and support our planning purposes for Year 3 of our SEF plan. The outcomes and measures for 2023/2024 can be found in **Appendix 1, pages 72-76**.

10. Planning and Reporting

10.1. It is important that we are clearly accountable to both our internal and external stakeholders. Consultation and engagement with schools is integral to this process as is the need to report both on a local and National level. Our governance structure for Strategic Equity Funding can be found in **Appendix 1 page 77**.

10.2. Planning and reporting are integral to supporting the work of the plan. A planning and reporting cycle has been outlined by Scottish Government which offers ongoing local and National support and challenge towards our stretch aims. In order to ensure we are closely monitoring our plan improving outcomes for children and young people

impacted by poverty we also have our own internal mechanism for planning and reporting as outlined below:-

- ◆ Project leads meet with the Head of Education (Primary and Early Years) and Project Co-ordinator every 8 weeks
- ◆ The Head of Education (Primary and Early Years) reports back to the SEF Core Group
- ◆ Head of Education (Primary and Early Years) reports back to Resource Management Team
- ◆ Report to Scottish Government via Standards and Quality Report

11. Pupil Equity Funding

- 11.1. For 2023/2024, South Lanarkshire Council schools have been allocated £9.9M in PEF money. This is allocated to 146 out of 148 SLC schools. Jackton Primary School is not currently included in these figures. Schools continue to have direct control over their PEF monies and how this is spent. Schools take into account their individual context and consult and engage with stakeholders and partners to ensure the monies are spent to secure maximum impact for the children and families in most need.
- 11.2. All schools with Pupil Equity Funding submit two Profiles of Spend; one outlines how they intend to spend their allocation and the other outlines the actual spend of their allocation at year-end. Schools also report in more detail on how they utilise their PEF via their School Improvement Plan. A final impact report is outlined in the schools' Standards and Quality Report. School PEF planning and spend is scrutinised to ensure the funds are being spent appropriately and having direct impact on pupils affected by poverty.

12. Cost of the School Day and Poverty Awareness

- 12.1. One of our core plus measures is a Cost of the School Day measure. By June 2024, all South Lanarkshire schools will move from a Position Statement on Cost of the School Day to a school Policy document which should be available on school websites and be focused on taking practical steps to support families. Schools should also support families to access all financial supports and entitlements. This includes working to increase the uptake of Free School Meals and Clothing Grants by all who are entitled and signposting families to other agencies when required.
- 12.2. A central Curriculum and Quality Improvement Service (CQIS) officer is actively supporting this aspect of the equity agenda through the delivery of Poverty Awareness and Cost of the School Day training and professional learning. A Cost of the School Day working Party has been established to provide guidance and exemplars on establishing a Cost of the School Day policy that will be shared with schools on 25 March at the Cost of the School Day Conference. By removing as many cost barriers to engagement and participation as we can, we hope to succeed in our mission to not only close the poverty-related attainment gap but provide the best experience for all children and young people in South Lanarkshire.

13. Employee Implications

- 13.1. A number of temporary central officer posts have been created which will help drive forward the work of our SEF workstreams. These are funded from SEF. More details can be found in **Appendix 1, page 52**.

14. Financial Implications

- 14.1. Funding for the Strategic Equity Fund has been committed until 2025/2026 to allow for sustainability and future planning.

15. Climate Change, Sustainability and Environmental Implications

- 15.1 There are no significant implications for climate change, sustainability and the environment arising from the recommendations in this report.

16. Other Implications

- 16.1. There are no other implications in terms of the information contained within this report.

17. Equality Impact Assessment and Consultation Arrangements

- 17.1 There is no requirement to undertake a specific equality impact assessment for this report. The report highlights a range of consultation and engagement activities and highlights the effective impact of parents/carers and pupils in the participatory budget process and the difference this is making.

Carole McKenzie

Executive Director (Education Resources)

12 February 2024

Link(s) to Council Values/Priorities/Outcomes

- ♦ Education and learning: inspiring learners, transforming learning, strengthening partnerships

Previous References

- ♦ Education Resources Committee – 15 November 2022

Contact for Further Information

If you would like to inspect the background papers or want further information, please contact:-

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