

A school level review of the Pupil Development Grant (PDG)

Research

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Audience Welsh Government policymakers; local education authorities; regional consortia; national and regional organisations in Wales and school staff with an interest in promoting and supporting disadvantaged learners.

Overview This report investigates the effective targeting of the Pupil Development Grant to disadvantaged learners.

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Action required The findings and recommendations have been fed back to the Welsh Government for their consideration.

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<https://www.gov.wales/education-of-disadvantaged-children>

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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List of Abbreviations

ACE	Adverse Childhood Experiences
ALN	Additional Learning Needs
ALP	Accelerated Learning Programme
AoLE	Areas of Learning and Experience
ASC	Autism Spectrum Condition
BPVS	British Picture Vocabulary Scale
CATS	Cognitive Ability Tests
CfW	Curriculum for Wales
ChaTT	Children's Assessment Teaching Tool
CLA	Children Looked After
CAMHS	Child and Adolescent Mental Health Service
ComIT	Communication Intervention Team
CPD	Continuing Professional Development
DEIS	Delivering Equality of Opportunity in Schools
DfE	Department for Education
EEF	Education Endowment Foundation
eFSM	Eligible for Free School Meals
EIG	Education Improvement Grant
ELSA	Emotional Literacy Support Assistant
EOTAS	Education Other Than at School
EYPDG	Early Years Pupil Development Grant
FEO	Family Engagement Officers
HLE	Home Learning Environment
HLTA	Higher Level Teaching Assistant
IDP	Individual Development Plans
LA	Local Authority
LAC	Looked After Children
MAT	More Able and Talented
MILSA	Microsoft Learn Student Ambassadors

NEET	Not in Education, Employment, or Training
PASS	Pupil Attitudes to Self and School
PD	Personal Development
PDG	Pupil Development Grant
PEF	Pupil Equity Fund
PEP	Personal Education Plan
PLASC	Pupil Level Annual School Census
POPAT	Programme of Phoneme Awareness Training
PP	Pupil Premium
PRU	Pupil Referral Unit
RADY	Raising the Attainment of Disadvantaged Youngsters
RiLL	Research in Language and Literacy, Speech/Language
RRRs	Recruit, Recover, Raise Standards
SDP	School Development Plan
SEBD	Social Emotional Behavioural Difficulties
SEMH	Social, Emotional and Mental Health
SEN	Special Educational Needs
TA	Teaching Assistant
TiS	Trauma informed School
TSN	Targeting Social Need
TRUGS	Teaching Reading Using Games
UPFSM	Universal Primary Free School Meals

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Executive Summary

Introduction and Context

The Pupil Development Grant (PDG) is funding given to schools and educational settings which aims to raise the attainment of children and young people from low-income households and those who are care-experienced. This report was commissioned in response to recommendations from a previous review on the use of the PDG in Wales, [Review of the Pupil Development Grant](#) (Tiesteel et al., 2023). Findings from the previous report recommended that there was a need to understand how members of staff responsible for the PDG funding in educational settings in Wales use and view the PDG. The report also highlighted a need to understand the issues related to the targeting, implementation, and monitoring of the PDG as well as the future needs of educational settings in relation to the barriers associated with poverty.

In brief, the recommendations from the 2023 review were:

- The Welsh Government should consult educational settings to gather their views on effective strategies, monitoring activities, and targeting of the PDG.
- With the introduction of universal FSM in primary schools, the approach to calculating PDG needs reconsideration due to potential data set compromises.
- Funding research to explore Clear, regularly updated guidance on PDG use should be provided to schools, local authorities, and regional consortia.
- PDG targeting and effective practices could help identify areas of need.
- Career-long professional learning on socio-economic disadvantage impacts should be embedded from initial teacher education and throughout professional learning.
- Aligning PDG administration with school planning cycles and allocating it on 4/5-year cycles would support long-term Clear guidance on PDG use, robust monitoring, and evaluation processes, along with increased funding, are essential.
- strategies.
- Transparent reporting and collaboration among the Welsh Government, local authorities, and regional consortia are crucial for effective PDG use.

The 2023 [review](#) supported the development of the aims of this review.

Aims and objective of this research

This research was designed to understand the following broad aims from the perspective of school leaders and staff in educational settings¹:

1. To identify what information is currently available on the use of PDG in educational settings.
2. To understand the monitoring, governance and guidance structures that are available to PDG decision makers in educational settings.
3. To identify how the grant is targeted, and how impact is measured.
4. To understand effective strategies within the system and barriers to effective impact of PDG.

Summary of Methodology

A mixed methods approach was used to gather findings from three phases of research:

- **Phase 1** identified and analysed PDG statements from school websites from a sample of mainstream primary and secondary schools that had made their statements available.
- **Phase 2** involved a national online survey with staff responsible for the PDG in educational settings.
- **Phase 3** involved semi-structured interviews with school leaders and decision-makers in local authorities responsible for disseminating the grant.

Main findings

Schools and settings focus their PDG spend on three areas:

- supporting the social and emotional wellbeing of learners
- family and parental engagement
- improvements in learning and teaching designed to raise attainment.

This indicates that they are using the PDG within the terms and conditions of the Welsh Government grant.

Because increasingly the PDG is being used to meet shortfalls in core budgets this inevitably inhibits attempts to track, monitor and rigorously evaluate the discrete impact of the grant.

¹The focus was on PDG as a whole; where possible the different elements of the grant are discussed (i.e. EYPDG, PDG-LAC, EOTAS PDG).

Approximately half of the sample of schools and settings complied with the Welsh Government requirement to publish an online statement of their use of the PDG and only some of these used the template required: this inevitably limits transparency and monitoring in relation to the grant.

Schools and settings believe their own internal monitoring of the use of the PDG to be effective but have mixed views on the impact of external monitoring. They would welcome additional guidance, signposting to available resources, and opportunities to engage in professional learning, collaboration with other schools and professional networking.

They perceive there to be two main barriers in relation to capturing the full impact of the PDG:

- The lack of robust indicators to measure the impact of the significant spend they make on emotional and social support for learners and family/parental engagement.
- The increased pressures that have been placed on schools and school budgets in recent years at a time when poverty has been rising and ever greater demands are being made on schools.

Schools believe that the PDG funding formulae should be reviewed to address:

- The impact of growing poverty on settings in the most socio-economically disadvantaged areas.
- The barriers resulting from a single annual funding cycle.
- Concerns around the eFSM measure as a proxy that captures all low-income households, particularly given the rollout of UPFSM.
- The need to increase funding to keep pace with inflation.

Recommendations

1. To support both transparency in the use of the PDG by schools and external monitoring of the use of the grant, Welsh Government should support and strengthen the requirement upon schools to publish an online statement of their PDG expenditure using the template provided.
2. Welsh Government should consider an online format for reporting that supports schools in planning, targeting and monitoring PDG spend and publishing this information.
3. Welsh Government should establish a National PDG Advisory Group made up of representatives of schools, local authorities, Estyn, the Education Endowment Foundation, initial teacher education institutions and educational researchers. The responsibilities should be to:
 - Produce evidence-informed additional guidance and exemplification on the use of the PDG, including publicising the resources produced by the EEF, Welsh Government and Estyn.
 - Develop a broad range of indicators (quantitative and qualitative) which schools and external bodies can use to assess the impact of the PDG.

- Develop a user-friendly template that allows schools to report on the outcomes of their use of the PDG to support recommendations 1 and 2.
 - Advise Welsh Government and local authorities on professional learning and professional networking that can support evidence-informed use of the PDG.
4. Given increased budgetary pressures on schools, the growth in child poverty, changes to free school meal eligibility and concerns about the current timeframes of the grant, Welsh Government - following consultation with partners - should consider a multi-year allocation and increase PDG. In addition, review the funding formula to increase core budgets given the increasing needs post COVID-19.
 5. Given the problems identified in the use of PDG-LAC and to ensure that some of the most vulnerable learners in the education system are appropriately supported, the Welsh Government and local authorities should ensure that all care-experienced learners have access to PDG-LAC.
 6. Further research is needed in the following areas:
 - Due to the limited representation of EYPDG, PDG-LAC and EOTAS (other than PRUs) in the study, further research is necessary to understand the targeting, monitoring, and challenges encountered in use of these funds.
 - Due to limited representation of wider settings in this and previous research (i.e. nurseries, independent nurseries, middle schools/ all-age schools, special schools) further research is necessary to understand the targeting, monitoring, and challenges encountered in these settings.

1. Introduction

The Pupil Development Grant (PDG) is funding given to schools and educational settings (settings) which aims to raise the attainment of children and young people from low-income households and those who are care-experienced in Wales. The purpose of this research was focused on understanding how the PDG is used by members of staff responsible for the funding in educational settings to support learners from low-income households². The current review was undertaken in response to recommendations from a previous review conducted on PDG spending that focused only on the perspectives and experience of middle tier organisations³ to supplement that report in canvassing the opinions of school leaders (Tiesteel et al., 2023). School leaders and staff were not included in the previous research study due to the significant pressures educational settings were facing post-pandemic. The report recommended that the Welsh Government consider the perspectives of staff responsible for the PDG in educational settings regarding effective strategies, monitoring activities, and the targeting of the PDG. This report focused on members of staff responsible for the PDG in educational settings to close this knowledge gap.

Purpose and aims of this research

In consultation with the Welsh Government, the research team developed the main aims for this research along with the research questions and the data collection methods. This is outlined in Table 1.

Table 1 Aims, research questions and methodologies

Aims	Research questions	Method of data collection
To identify what information is currently available on the utilisation of PDG spending.	<ul style="list-style-type: none"> • What data do educational settings make available on PDG spending to the public and governing bodies? • How are decision makers of PDG utilising the fund to support disadvantaged learners? 	Documentary analysis and online survey
To understand the impact, governance and guidance structures that are available to PDG decision makers.	<p>Effective strategies –</p> <ul style="list-style-type: none"> • How effective do educational settings perceive the PDG to be in meeting its intended aims? What barriers to efficacy do educational settings identify and how are they mitigating these? • To what extent does educational settings' use of PDG align with Welsh Government 	Documentary analysis, online survey and semi-structured interviews

² PDG is also provided for care-experienced learners (PDG-LAC), learners from low-income households that are in early years settings (EYPDG) and learners who are receiving education other than at school (EOTAS PDG).

³ Middle tier organisations included local authorities, Estyn and regional school improvement consortia.

Aims	Research questions	Method of data collection
<p>To identify how the grant is targeted, and impact is measured.</p> <p>To understand effective strategies within the system and barriers to impact</p>	<p>recommendations, best practice guidelines and evidence? In addition, are there any challenges to the implementation of strategies funded by PDG?</p> <p>Monitoring and governance⁴</p> <ul style="list-style-type: none"> • What kind of governance and monitoring mechanisms are in place to ensure strategic and evidence-based use of the PDG? • How do these structures contribute to the appropriate use and targeted use of the grant? What facilitates or prevents monitoring? • What monitoring systems and governance do educational settings perceive to be appropriate for the PDG grant? <p>Targeting</p> <ul style="list-style-type: none"> • How are educational settings targeting their PDG spend? What guidance do they draw upon to inform this? What are the challenges in targeting PDG to disadvantaged learners? How do educational settings define disadvantaged learners? What are the primary needs that educational settings feel the PDG needs to address? <p>Impact</p> <ul style="list-style-type: none"> • How do educational settings monitor and track impact? What are the barriers to tracking impact? What support do educational settings need to demonstrate the impact of PDG? What are the barriers to PDG funding that might limit the impact on the poverty related attainment gap? 	

Educational settings: The research aimed to cover a range of educational settings where PDG is disseminated. This included: primary, secondary, all-through schools, special schools and pupil referral units (PRUs). Where appropriate, as in the case for PDG-LAC, EYPDG and EOTAS PDG, local authorities and regional education consortia/partnerships were contacted.

Stakeholders: The research aimed to contact stakeholders with significant decision-making responsibility in relation to PDG. This included headteachers and senior

⁴ Governance in this research is defined by the structure around educational settings who support and govern the use of PDG, this will include organisation such as LA, WG, consortia, governors and Estyn who all have a duty to support and monitor educational settings' PDG use.

leaders, PDG leads in educational settings, and where appropriate local authorities and regional education consortia. Given that research had already been conducted with the middle tier of the education system, the focus of the current research was on a school or setting level to review how PDG is being used to support learners from low-income households.

Demographics: To be as representative of the Welsh education landscape as possible, the range of contextual factors which have been considered for the current research include the following:

- Percentage of students eligible for free school meals (eFSM) (comparison between schools/ educational settings with a high percentage vs lower percentage than the national average⁵)
- School size (small, medium, large)
- Location (urban, rural)
- Type of school/setting
- Welsh-language status

Structure of this report

Chapter 2 provides contextual information on the focus of the current report as well as a review of the existing literature on PDG funding.

Chapter 3 describes the research methodology used in this study, including the three phases of research: (1) documentary analysis; (2) online survey; and (3) semi-structured interviews.

Chapter 4 presents the findings of the documentary analysis, online survey and semi-structured interviews.

Chapter 5 presents the discussion of the studies main findings from the three phases of research and provides recommendations for policy makers.

⁵ The national average was 22.2 % (Welsh Government, 2023b)

2. Literature Review

Background

The policy and strategy document [Our national mission: high standards and aspirations for all](#) states that the Pupil Development Grant (PDG) plays a key role in supporting the Welsh Government's ambition to achieve high standards and aspirations for all learners in Wales (Welsh Government, 2023a). The PDG is funding allocated to educational settings to support learners from low-income households and learners who are care-experienced. The Welsh Government webpage [Pupil Development Grant \(PDG\): overview](#) (updated in 2024) indicates that the aim of the PDG, early years PDG (EYPDG), and education other than at school PDG (EOTAS PDG) funding is to enhance the attainment of children and young people from low-income households. The PDG for looked after children (PDG-LAC) is allocated for all care-experienced children – including those who are looked after (CLA, also known as LAC) – to mitigate the barriers these learners may experience and provide support to achieve educational attainment (Welsh Government, 2024a). PDG-LAC, EOTAS PDG and EYPDG are allocated to local authorities who are responsible for distributing the funding.

Comparable to the PDG in Wales, there are similar funding policies designed to improve educational outcomes for disadvantaged learners in the other nations of the UK as well as the Republic of Ireland. In England, the Pupil Premium (PP) is allocated to enhance the educational outcomes of disadvantaged learners in state-funded schools (Department for Education, 2024). In Scotland, the Pupil Equity Fund (PEF) is allocated to schools with the aim of improving educational outcomes for children and young people affected by poverty (Scottish Government, 2024), and to ensure that every child has equal opportunities regardless of background (Tiesteel et al., 2023). In Northern Ireland, Targeting Social Need (TSN) funding is provided to schools by the Department of Education as part of core school budgets to support the additional challenges and expenses associated with assisting children and young people from low-income households and learners at risk of educational underachievement (Department of Education, 2024). In the Republic of Ireland, Delivering Equality of Opportunity in Schools (DEIS) funding intends to address any disadvantage within the school system. The aim of DEIS is to ensure that learners from disadvantaged backgrounds can access improved opportunities through education (Fleming and Harford, 2021).

Pupil Development Grant in Wales

The Welsh Government [Programme for Government](#) (Welsh Government, 2021a) has a key focus on tackling the impact of poverty. The previous Minister for Education and Welsh Language set out the national mission to re-focus on the

poverty related attainment gap to improve outcomes for disadvantaged learners through a focus on eight key areas presented in Table 2.

The latest PDG guidance published by Welsh Government advocates that educational settings should focus spending using a tiered approach particularly focused on high quality learning and teaching and community focused schools, as well as wider strategies which relates to the other areas listed above (Welsh Government, 2023c; Welsh Government, 2024b). A PDG school statement template is included as an annex to the PDG guidance which schools are expected to complete, outlining their plans for PDG spend/activities. The guidance emphasises a stronger focus on assessing the needs of learners and taking a more evidence-informed approach, as shown in Figure 1 (Welsh Government, 2023c).

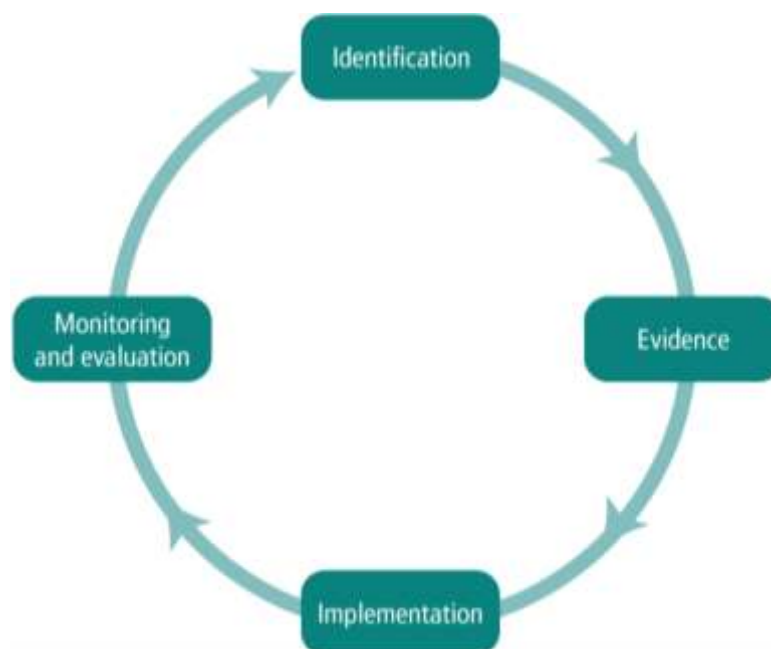


Figure 1 An evidence-informed approach: a 4-stage process

The PDG guidance suggests how members of staff in educational settings can focus PDG spending on the key areas of focus listed above, whilst the PDG overview webpage provides more information on the subsidiary PDG grants (PDG-LAC, EYPDG and EOTAS PDG) to further understand the grants' intended coverage and areas of focus. The PDG guidance is similar to the guidance published by the Education Endowment Foundation (EEF) on the Pupil Premium which suggests a tiered approach to targeting PP spending, much like the new PDG school statement form. The EEF guidance also suggests a 5-step approach to implement, monitor, and sustain PP spending activities (EEF, 2023). The Department of Education's (DfE) guidance on PP has several approaches for educational settings to frame the PP spending activities and educational settings are expected to utilise the PP within

this menu of approaches (EEF, 2024a). In spring 2024, Welsh Government and the EEF have published a Welsh language version of the EEF Teaching and Learning toolkit ([EEF toolkit](#)), the key resource outlined in the PDG guidance to support high quality learning and teaching to benefit lower income learners, which provides comprehensive information on the advantages and associated expenses of each approach (EEF, 2024b).

Educational settings are expected to report on spending and activities within their PDG plan and these are monitored by PDG advisors. PDG advisors are responsible for providing high quality support to educational settings and constructively challenging PDG spending to ensure that the PDG is linked to supporting learners from low-income households and that educational settings are using evidence informed approaches (Welsh Government, 2024a). One of the conditions of the PDG is that educational settings are required to include plans on PDG usage in their school development plans as well as ensuring PDG statements are publicly available on the school website. It is the responsibility of the PDG advisor to monitor educational settings publication of this information.

Most of the PDG funding is given to educational settings based on the number of learners eligible for free school meals (eFSM). Specifically, PDG allocations are based on the number of individual learners identified as being eFSM in the Pupil Level Annual Census (PLASC) data for the previous academic year (Welsh Government, 2023b). Based on the [Pre-16 education grants](#) information published by the Welsh Government in 2024, in the 2024/2025 academic year, a total of £114.6 million was allocated for PDG, and £1,150 was allocated per eFSM or looked after learner (Welsh Government, 2024c). Furthermore, £7.1m additional funding has been made available in the 2024/2025 academic year. This additional PDG funding has been given to LAs to distribute to educational settings (Welsh Government, 2024c). To ensure PDG is spent strategically, a further £400,000 has been allocated for LA or regional PDG advisers (Welsh Government, 2024a). Table 1 presents the key areas of focus set out by the Welsh Government in the available guidance documents on how educational settings should use PDG.

Table 2 Focus of PDG⁶ based on learner demographics

PDG – Key areas
High-quality learning and teaching
Community focused schools
Early childhood play, learning and care
High aspirations supported by strong relationships
Health and wellbeing
Leadership
Curriculum for Wales and qualifications
Supporting post-16 progression
EYPDG – Key areas
Emotional and social wellbeing
Physical development
Speech, language, and communication
PDG-LAC – Key areas
Disproportionately benefitting looked after and care-experienced children
Contributing to the development of inclusive educational settings (i.e., schools and other educational settings) committed to equity and wellbeing
To increase capacity and deliver tailored interventions in clusters of educational settings (i.e. schools and other educational settings). The interventions funded via the PDG must align with the specific needs of individual learners and they need to be grounded in strong evidence of positive impact for their learning outcomes.
A learner-centred approach is advised to gather the perspectives of individuals, which are then used to shape the plans of educational settings and clusters, and to inform the strategies of local authorities or regions.

Source: Welsh Government (2024a)

Outcomes in Wales

Schools' expenditure per learner is budgeted to be £7,926 for 2024-2025 academic year, this is a year-on-year increase of 8.2% (Statistics for Wales, 2024). Concerns have been raised about standards in Wales on international and national

⁶ No guidance is detailed on EOTAS however LA are responsible for the allocation this includes engaging with settings and setting out the arrangements for planning and delivery.

assessments such as the Programme for International Student Assessments (PISA) and GCSE results, which show learners in Wales are behind their peers in other UK nations. This is particularly acute for learners from disadvantaged backgrounds (Sibieta, 2024). The achievement gap is as much as 25 months between non-disadvantaged learners and learners from low-income households in some local authorities⁷ or the PISA results in 2022 there was a decline in scores across all measures, with mathematics being significantly lower than the OECD average (Ingram et al., 2023). The Well-being of Future Generations Act ([Well-being of Future Generations \(Wales\)](#)) places a long-term focus with the target of 90% of 16-24 year olds being in education, employment or training by 2025. The latest analysis reveals the NEET rate for 16 to 18-year-olds in Wales was 6.6% in March 2024, down 3.3 points from the previous year, 1.6 points over five years, and 4.1 points over ten years. For 19 to 24-year-olds, the NEET rate was 14.5%, down 1.3 points from the previous year, 1.8 points over five years, and 5.3 points over ten years (Welsh Government, 2024e). While the overall trend is reducing figures there is still some work to do to reach WFG Act targets to address inequality. The long-term impacts of leaving education with little or no qualifications are profound, and these impacts can adversely affect future earnings, health outcomes, quality of life and can represent a significant long-term cost burden to society and individuals (Blanden, Doepke and Stuhler, 2023).

System changes and challenges

The COVID-19 pandemic has disproportionately impacted learners from low-income households on a range of outcomes (McKinney et al., 2023). A meta-analysis of learning loss post-pandemic showed there was a significant drop in educational outcomes (Betthäuser, Bach-Mortensen and Engzell, 2023). While additional investment was made in the education system, and Wales invested more than the other UK nations, reading levels in Wales have not returned to pre-pandemic levels (Welsh Government, 2023d) and this is a major concern for policy makers (Senedd Cymru, 2023). Attendance levels since the COVID-19 pandemic have been in decline and this is a particular issue for learners from low-income households; notably there has been a growth in learners who are persistently absent, particularly learners from low-income households (Estyn, 2024; Welsh Government, 2022a).

Wales has also undergone a series of significant reform of education policy and direction. The introduction of the purpose-driven Curriculum for Wales (CfW) was designed to replace the national curriculum. The roll out of the CfW began in 2022 and will be fully implemented by 2026 across all school-aged learners (3-16). The CfW is designed to be a more inclusive approach to education and is focused on developing learners' skills and knowledge across six Areas of Learning and Experience (AoLEs) (OECD, 2017). There have been some concerns raised,

⁷ This is based GCSE results from summer 2019, as different methods of centre and teacher-assessed assessment would render comparisons for 2020 and 2021 inconsistent.

however, about the lack of assessment understanding (Robinson, 2022), and the limited data available to understand learners' progress across different educational settings, learner cohorts and learner background characteristics (Sibieta, 2024). There is also a concern that without externally verified curriculum assessment, the CfW could increase inequalities, especially for those learners from disadvantaged backgrounds or those who have an additional learning need (ALN), which is at odds with the four purposes of the CfW (Power, Newton and Taylor, 2020).

The school improvement reforms in Wales emphasise self evaluation and continuous development to enhance educational outcomes (Hwb, 2022). This approach encourages educational settings to assess their own strengths and areas for improvement regularly, fostering a proactive and open culture for continuous improvement. Estyn, the education inspectorate in Wales, supports this by focusing on identifying strengths and development areas rather than issuing headline summative grades. Regional education consortia, partnerships and local authorities provide tailored support to educational settings, enabling strategic and coordinated improvement efforts. This framework is part of the Welsh Government broader commitment to raising educational standards, reducing attainment gaps, and improving learner wellbeing.

The new Additional Learning Needs and Education Tribunal (Wales) Act 2018 replaced the previous Special Educational Needs (SEN) framework with a more inclusive system. The ALN Act introduced Individual Development Plans (IDPs) for all learners with ALN, regardless of their need. This shift aims to provide more tailored support and ensure that all learners have the resources they need to succeed (Welsh Government, 2022b). There have been some concerns around the changes in the system and the lack of cohesion across ALN and CfW reforms and guidance (Knight and Crick, 2022). While Wales has undergone large education policy changes, the full impact of this is yet to be appreciated or evaluated.

Financial landscape

School-level spending aimed at negating the poverty-related attainment gap in all UK nations shows there is limited understanding of how the resources are deployed on a day-to-day basis (Tiesteel et al., 2023 Read, Macer and Parfitt, 2020; Gorard, 2022;). This is coupled with a wider pressure on budgets due to rising costs, with some headteachers concerned that the education system is at 'breaking point' (NAHT Cymru, 2024a). Data from Statistics for Wales identified that school reserves had increased significantly during COVID-19 but in the years 2022-23 there was a significant reduction of reserves, and this was attributed in part to high inflation, learners' support needs, and increased ALN costs (Statistics for Wales, 2023). There is evidence that additional spending can support better outcomes for disadvantaged learners particularly if it is focused directly at supporting them. However, the education system needs to be high performing to make the best use of that extra funding (Sibieta, 2024).

Growth in child poverty

There has been an increase in child poverty, with an estimated 30% of children in the UK, and a third of children in Wales, living in poverty (JRF, 2024) and this number is likely to rise (Child Poverty Action Group, 2023). The rising cost of living has adversely affected living standards, forcing families to forego essential items such as food and heating. The Trussell Trust has reported an increase in the distribution of food parcels in 2023/24 in comparison to previous years. Notably, between 2023 and 24, 68,593 of these parcels were designated for children (The Trussell Trust, 2024). Analysis conducted by the Welsh Government indicates a rise in material poverty among adults with children there has been an increase of 5% since 2021-22. A national survey revealed that 25% of parents experienced an increase in material poverty, with 9% of children identified as suffering from material deprivation during the 2022-2023 period – this is an increase of 6% from 2019-20 (Welsh Government, 2024d).

Education funding to support equity

The first grant that specifically targeted low-income learners in Wales was Raising Attainment and Individual Standards in Education (RAISE) in 2006. This was based on the number of learners entitled to free school meals. Evaluation of RAISE showed that there were some impacts on learners' basic skill acquisition and improved social and emotional skills. Data on Key Stage 1 outcomes detailed no change in attainment for the schools that received RAISE funding. In Key Stage 2, there were some small improvements, but in Key Stages 3 and 4, there had been no improvement in the attainment gap (Rees and Park, 2012).

Following RAISE, the Pupil Deprivation Grant⁸ was rolled out to all schools in Wales for learners who were entitled to free school meals (Welsh Government, 2017). The Welsh Government commissioned an evaluation that spanned a three-year period and consisted of case studies to attempt to understand how the funding was being used alongside analysis of the National Pupil Database to evaluate the impact on learners. The conclusions noted that the temporary nature of the funding might have encouraged schools to focus on immediate needs and prioritise short-term interventions over long-term planning.

The report highlighted that schools facing the largest attainment gaps often relied on their own experiences of effective strategies rather than external evidence. This was due to factors like unawareness, scepticism, or feeling overwhelmed by the breadth of available evidence. The findings were that Welsh Government and consortia could have played a crucial role in helping these schools use external evidence effectively, promoting successful local practices, and encouraging schools to adapt proven

⁸ The Pupil Deprivation Grant was introduced in 2012 it has now been renamed to the Pupil Development Grant.

strategies to their specific contexts. Consortia also had the potential to spread awareness of best practices and support collaborative initiatives among schools, but they should have also challenged schools to adopt new approaches for sustained improvement (Welsh Government, 2017).

Following this report, the Welsh Government commissioned a review of PDG in 2023. This identified perspectives of local authorities, Estyn, and regional consortia. The research report made several recommendations: a need for updated guidance on PDG usage; providing professional learning focused on the impacts of poverty and disadvantage on learning, starting with initial teacher education and continuous professional learning for teachers; ensuring that the PDG administration aligned with school planning cycles and allocating funds on a 4–5-year cycle to support long-term planning; stronger collaboration among the Welsh Government, local authorities, and regional consortia was seen as crucial to support a unified approach to monitoring PDG's impact; increasing PDG funding was seen as necessary to address the challenges in narrowing the attainment gap and reducing the impact of poverty on learners; the impact of universal provision of primary free school meals was seen as a concern for the measurement of eFSM as a proxy for identifying low-income learners; and, the need for further research to engage directly with schools to understand effective strategies, targeting, and best practice⁹ (Tiesteel et al., 2023).

As such, there is a need to understand how PDG is operationalised at an educational setting or school level, and to understand the targeting, strategies, effective practice, impact, and challenges of implementing PDG. This is in light of the different challenges that schools are facing particularly post-pandemic and the rise of poverty and policy changes. This has led the Welsh Government to commission a further review of PDG that is focused on educational settings and schools.

⁹ Schools were not approached for this evaluation given the pressure they were facing after the COVID-19 disruptions

3. Methods

The research methods for the current study were chosen to align with the most rigorous approach; this included a questions-to-methods approach proposed by Owen, Watkins and Hughes (2022). The use of mixed methods in educational research is valuable as it enables researchers to capture the inherent complexity of educational settings more comprehensively. This approach allows for corroboration and convergence between different data sources, thereby enhancing the robustness and validity of the conclusions (Almalki, 2016; Kelle, 2006).

The current study consisted of three phases of research, including: (1) documentary analysis; (2) online survey; and (3) semi-structured interviews. Each phase was designed to address specific aspects of the research questions, and together, they provide a comprehensive understanding on the use of PDG.

Phase 1: Documentary analysis

The documentary analysis was employed to gain an insight into how the PDG is being used by mainstream educational settings. It involved a thorough examination of published statements related to PDG usage and was conducted across three stages:

Stage 1: Screening all websites. We initially screened the websites of all educational settings in Wales to check for the availability of a PDG statement. This included nursery settings, primary, middle (all-age), secondary and special schools as well PRUs. The initial screening revealed that 925 (62%) of educational settings had a PDG statement on their official website, and 557 (38%) had no statement published.

Stage 2: Sampling of statements. We then selected a sample of primary and secondary schools with a PDG statement on their official website. We conducted a systematic sampling process with implicit stratification for selecting from the 879 primary and secondary schools identified to have a PDG statement on their official website. Primary and secondary schools were selected from an ordered list by: local authority (Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Carmarthenshire, Ceredigion, Conwy, Denbighshire, Flintshire, Gwynedd, Isle of Anglesey, Merthyr Tydfil, Monmouthshire, Neath Port Talbot, Newport, Pembrokeshire, Powys, Rhondda Cynon Taff, Swansea, Torfaen, Vale of Glamorgan and Wrexham); by language medium within local authority (dual stream, English medium, English with significant Welsh, transitional and Welsh medium); the percentage of learners in schools eligible for free school meals (eFSM) (mean percentage scores) for 2023/24. This allowed representation of key school characteristics in the final sample for primary and secondary schools. We obtained the contextual school data for 2023/24 from Statistics for Wales, Welsh Government. The sampling for the documentary analysis was conducted between February and March 2024.

While we wanted the final sample for the documentary analysis to be as representative of the different educational settings in Wales, the final sample only represents mainstream primary and secondary educational settings. The final sample did not include independent nurseries, middle schools (all-age), special schools or PRUs. The exclusion of these educational settings was based on their unique characteristics and the distinct needs of their learners, which made it inappropriate to compare them to mainstream educational settings.

Stage 3: Data extraction and analysis. We extracted data from the PDG statements to inform our analysis. In this stage of the documentary analysis, we extracted data using a table based on a tool used by a centrally funded education research body. To ensure the design of the instrument was appropriate to the context of the Welsh education system, and in consultation with colleagues in Welsh Government, we included five sections as follows: (1) school information; (2) overall spending profile; (3) challenges identified; (4) approaches; and (5) named programmes. The school information section encompassed 12 categories to gather a range of demographic and background information about each school. The overall spending profile section included 13 categories; for example, the total PDG allocation, key areas mentioned and total spending. The challenges identified section included 18 categories (e.g. attendance, aspiration, wellbeing etc.) that educational settings have acknowledged and planned to address via the use of the PDG funding. The approaches section contained 32 categories (e.g. ALN support, breakfast clubs and formative/diagnostic assessment). Finally, the named programmes section included any named externally provided programmes funded via the PDG.

Each statement was thoroughly screened and the presence of any information (e.g. year of publication, amount of funding, etc.), intervention (e.g. literacy, numeracy, etc.), programme (e.g. ELSA¹⁰, Step up, Thrive, etc.) and activity (e.g. residential trips, music lessons, etc.) related to the categories was entered on the data extraction table. Following data entry, descriptive statistics via the use of frequencies were used to analyse the findings. The results are presented in section 4.1.

Phase 2: Online Survey

The online survey aimed to explore the views and perceptions of individuals working in educational settings with significant responsibilities related to the use of PDG funding. Additionally, the survey sought to evaluate the effectiveness of targeting, governance, and strategies associated with the grant, and their impact on learner outcomes.

¹⁰ Emotional Literacy Support Assistant

Survey measure

The survey instrument contained 37 questions in the following four sections: (1) demographic information; (2) targeting and planning the PDG; (3) using the PDG; and (4) monitoring and governance.

The survey was developed and shared using the Jisc Online surveys programme (<https://app.onlinesurveys.jisc.ac.uk/>). The questions consisted of multiple-choice format questions (i.e. single and multiple answers), 4-point Likert-scale questions ranging from: very important (1) to not important (4); very useful (1) to not useful (4); and, very confident (1) to not at all confident (4). The survey also encompassed 5-point Likert-scale questions ranging from: significantly enhances (1) to significantly diminishes (5); and strongly agree (1) to strongly disagree (5). The survey included open-ended questions where appropriate. The survey instrument is presented in Appendix B.

The last question in the survey instrument offered participants the opportunity to take part in a follow-up interview. If they selected 'Yes', they could leave their contact information (i.e. email address). We used the contact information to invite participants to the semi-structured interviews for the third phase of the research. The percentage scores for the survey results are reported according to the following categories:

Negligible (0-9%)
Small minority (10-19%)
Minority (20-29%)
Substantial minority (30-39%)
Large minority (40-49%)
Nearly half (50-59%)
Majority (60-69%)
Significant majority (70-79%)
Large majority (80-89%):
Overwhelming majority (90-99%):
All (100%)

Survey procedure

The study invitation email for the online surveys that included the Welsh and English survey links were sent to the contact person in Welsh Government, local authorities, and regional consortia to be distributed to all educational settings in Wales. The survey data collection process took place between January and March 2024. Educational settings were first invited to participate in the survey in January 2024 and the survey closing date was 16th February 2024. However, to help increase the response rate the survey closing date was extended. Given the lower response rate in some counties compared to others, a concentrated recruitment strategy was

employed. This included contacting PDG advisors and local authority representatives in those areas to highlight the survey to educational settings. The email addresses of educational settings were sourced from publicly available data. The survey closed in March 2024.

Statistical and thematic analysis of open-ended comments

The survey data was processed and analysed using the statistical software programme IBM SPSS (version 27). The quantitative data was analysed using descriptive statistics (i.e. frequencies). The qualitative data was analysed using a thematic analysis approach which involves a six-stage process outlined by Braun and Clarke (2006): (1) familiarisation/immersion, (2) generating initial codes, (3) generating initial themes, (4) reviewing themes, (5) naming and defining themes, and (6) producing the report. In addition, Bree and Gallagher's (2016) approach was incorporated that builds upon Braun and Clarke's six-step process. Bree and Gallagher's methodology offers specific guidelines to strengthen systematic and rigorous analysis, emphasizing reflexivity, detailed coding, integration of multiple data sources, and validation techniques.

Response rate

In total, 131 participants accessed the online survey. Of the participants, 36 did not complete the survey questionnaire (i.e. opted out) and were redirected to the interview invitation page where they could express their interest to take part in the study interview. In total, 95 participants accessed and completed the online survey questionnaire. The overall number of responses used for statistical analysis was n=95.

Phase 3: Semi-structured interviews

The semi-structured interviews were conducted to gain an in-depth understanding into the effective targeting, monitoring and governance of PDG funding. In addition, the interviews explored the impact and challenges of using the PDG from the perspective of educational practitioners and administrators. The interview schedule included 26 questions that were designed around the following five sections: (1) targeting; (2) monitoring and governance; (3) strategies; (4) impact; and (5) future needs. In addition, participants were first given an introduction and an opportunity to settle into the interview. A copy of the interview schedule is contained in appendix C.

Participants and sample recruitment

The population for the current study was individuals who had decision-making capabilities around the dissemination and use of the PDG in an educational setting in Wales. While educational settings are the primary study population of this research,

it was necessary to also include participants who had decision-making responsibilities for the subsidiary grants, including PDG-LAC and EYPDG.¹¹

We first invited participants to take part in the interview via expression of interests at the end of the online survey at phase 2. In total, 19 participants expressed an interest to take part in an interview. Of the 19 participants, 5 agreed to be interviewed. In addition, invitation to take part in the interview was sent via the local authority and regional consortia. Further to this, a snowball sampling methodology was used to increase the number of participants. Snowball, or chain sampling, is a non-probability sampling technique where existing participants recruit potential participants from among their acquaintances or peers (Noy, 2008). In this case, the interviewees were asked if they were willing to share the research team's email with participants whom they considered would be interested in contributing to this research.

Interview procedure

Interviews were conducted between February and April 2024 by two members of the research team. In total, 21 interviews were conducted by researchers at Bangor University and Cardiff Metropolitan University with n=22 participants. One interview was conducted with two participants because the participants requested this. The interviews were conducted online using Microsoft Teams which served as a secure communication platform. Only the research officers conducting the interview and the participating interviewee could join the interview call. The length of the interviews ranged between approximately 25 and 80 minutes. All interviews took place online and were transcribed using the inbuilt function in Teams and edited by the interviewers to ensure accuracy.

Thematic analysis

Themes were identified using thematic analysis (Braun and Clarke, 2006). The qualitative data analysis was conducted by two team members, who, after becoming familiar with the data, began to develop initial codes. We employed a six-step process to develop the final themes, based on the stages outlined by Braun and Clarke (2006): (1) familiarization/immersion, (2) generating initial codes, (3) generating initial themes, (4) reviewing themes, (5) naming and defining themes, and (6) producing the report. This approach allows themes to emerge organically from the data and offers a flexible method for research. In addition, Bree and Gallagher's (2016) approach was incorporated that builds upon Braun and Clarke's six-step process. Bree and Gallagher's methodology offers specific guidelines to strengthen systematic and rigorous analysis, emphasizing reflexivity, detailed coding, integration

¹¹ Representative from all settings were invited to participate, the final sample did not include representatives from PRUs and EOTAS.

of multiple data sources, and validation techniques. Following the familiarisation process of the data set, researchers generated initial codes which were then cross checked between researchers using a process known as intercoder reliability (ICR). ICR strengthens the trustworthiness of the analysis process (Kurasaki, 2000) by examining the categories and decision processes made by the first researcher. ICR was calculated on a proportion (20%) of the responses. Researchers divided the number of agreements by the total number of agreements plus disagreements. The total score was calculated to be 97.1% agreement for the open-ended survey results and 98.06% agreement for the semi-structured interviews agreement between two researchers.

4. Results

4.1 Phase 1: Documentary analysis

The percentage scores for the results are reported according to the following categories:

Negligible (0-9%)

Small minority (10-19%)

Minority (20-29%)

Substantial minority (30-39%)

Large minority (40-49%)

Nearly half (50-59%)

Majority (60-69%)

Significant majority (70-79%)

Large majority (80-89%):

Overwhelming majority (90-99%):

All (100%)

4.1.1 Scoping results

The total number of educational settings based on sector for 2022/23 is presented in Table 3. The school data for 2023/24 was obtained from Welsh Government Statistics for Wales. In total, there were n=1,483 educational settings in Wales.

Table 3 Percentage of educational settings by sector (phase 1)

Type of educational setting	<i>N</i>	%
Independent nursery settings	6	0.4
Primary schools	1,211	82
Secondary schools	176	12
Middle schools	29	2
Specialist schools	39	3
PRUs	22	1

Note: Percentages may not sum to 100 due to rounding. The PLASC total number of schools for 2023/24 were obtained from the Welsh Government Statistics Team.

The availability of the PDG statement on the websites based on the type of educational settings is illustrated in Figure 2.

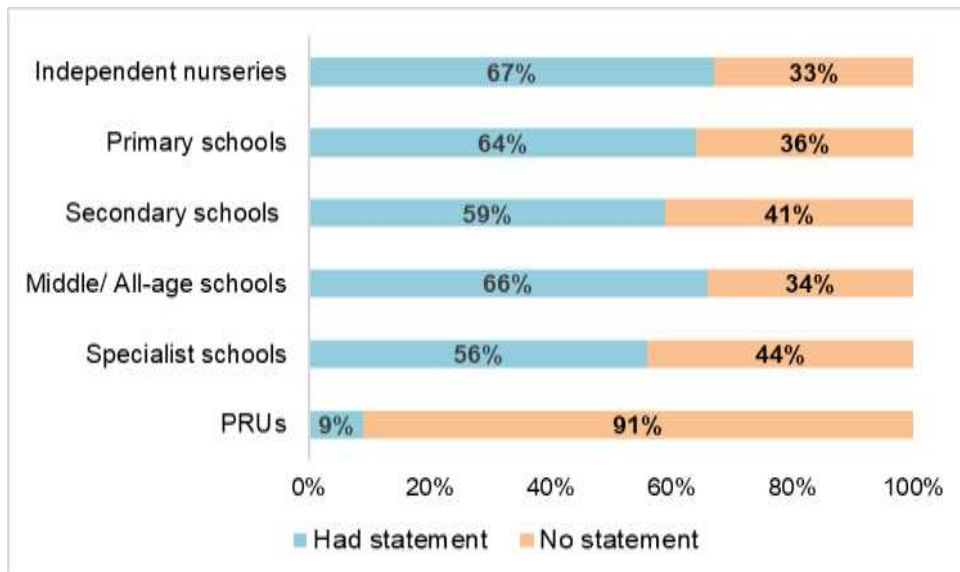


Figure 2 Percentage of PDG statements available on the official websites of educational settings (phase 1)

4.1.2 Sample description

The total number of primary and secondary educational settings included in the final documentary analysis is n=100 comprising n=88 primary schools and n=12 secondary schools. As a reminder, the final sample did not include independent nurseries, middle schools (all-age) schools, special schools or PRUs. The exclusion of these educational settings was based on their unique characteristics and the distinct needs of their learners, which made it inappropriate to compare them to mainstream educational settings.

Figure 3 shows the percentage of secondary and primary educational settings and the language of instruction in those settings.

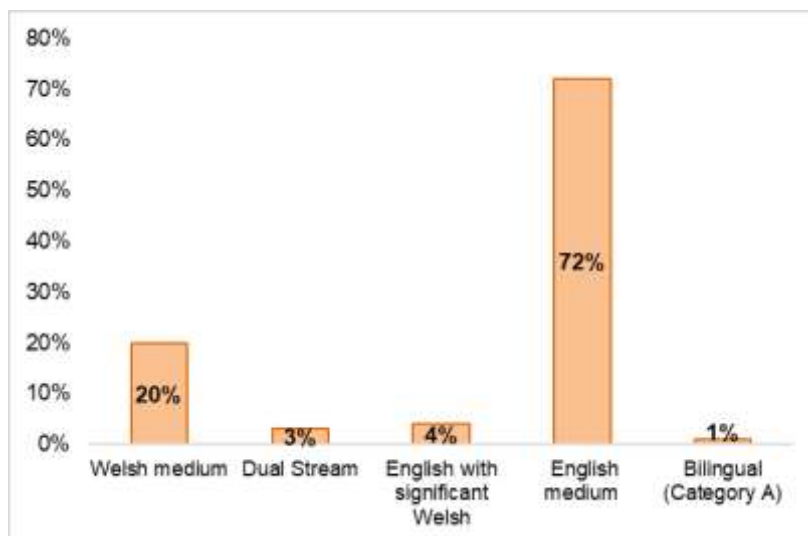


Figure 3 Percentage of primary and secondary educational settings by language category (phase 1)

The rural classification of the educational settings is presented in Table 4.

Table 4 Percentage of primary and secondary educational settings by urban-rural classification (phase 1)

Urban-rural classification	%
Urban city and town	66
Urban city and town in a sparse setting	1
Rural town and fringe	7
Rural town and fringe in a sparse setting	9
Rural village	8
Rural village in a sparse setting	5
Rural hamlet and isolated dwellings	2
Rural hamlet and isolated dwellings in a sparse setting	2

Table 5 shows the percentage of primary and secondary educational settings by school size of (i.e., number of learners).

Table 5 Percentage of primary and secondary educational settings by number of learners (phase 1)

Number of learners	%
0-60	9
61-150	25
151-400	52
401-800	6
801-1200	5
1201-1600	3

The national average for percentage of eFSM in January 2023 was 20.3 (Welsh Government, 2023b). Table 6 indicates that in this sample, 43% (n=43) educational settings had an eFSM percentage above the national average and 57% (n=57) educational settings with an eFSM percentage below the national average.

Table 6 Percentage of eFSM learners according to the sample of primary and secondary educational settings (phase 1)

Percentage of eFSM	%
0-5%	12
6-10%	13
11-15%	19
16-20%	13
21-30%	15
31-40%	19
41-50%	4
51-60%	2
61-70%	2
Over 70%	1

The location of educational settings is presented in Table 7.

Table 7 Percentage of primary and secondary educational settings by location (phase 1)

Location of setting	%
North Wales	18
Mid Wales	8
Southwest Wales	27
Southeast Wales	47

4.1.3 Data analysis

The results presented in this section are based on a total of 97 PDG statements. To reiterate, during the data analysis process, three educational settings were removed from the representative sample of n=100 because the PDG statement could not be opened, or it was removed from the website since the initial secondary analysis was conducted between February and March 2024.

Statement type

Design of the statement

This sub-section focuses on the design of the statements, the detail of the information disclosed, the grants covered in the statements and the year they were published on the official websites of primary and secondary educational settings. Nearly half of this sample of primary and secondary educational settings i.e., 59% (n=57) provided the information related to the PDG using a school design (Figure 4). This was followed by n=33 (34%) educational settings that have written the PDG statement using the template designed by Welsh Government ([Welsh Government PDG school statement template](#)) (Figure 4).

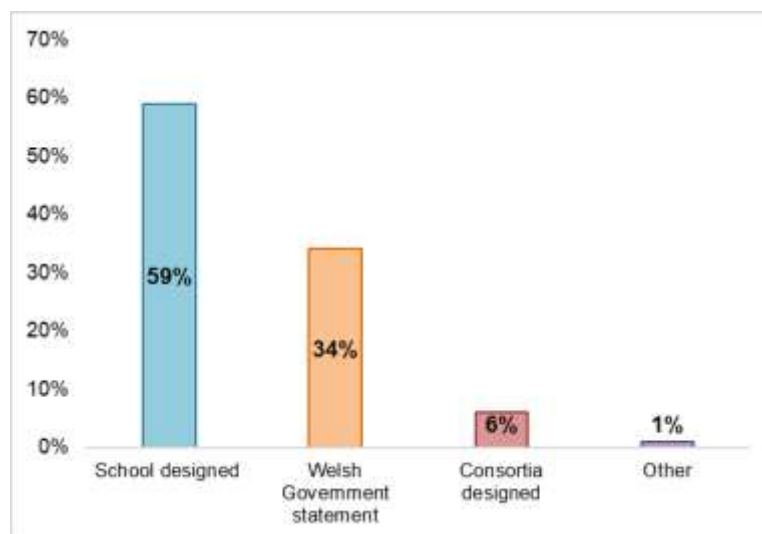


Figure 4 Percentage of PDG statements according to the designs being used by primary and secondary educational settings (phase 1)

Level of detail

Next, the statements were classified based on the level of detail provided on the statements. Statements that encompassed a paragraph with a limited breakdown of intended spend and intended outcomes were classified as having 'limited detail'. Statements classified under 'some detail' included some financial breakdowns and limited descriptions on intended spend activities. Finally, statements classified as having 'extensive detail' provided a financial breakdown on each element of activity along with a narrative description of intended use and how impact will be monitored. Figure 5 demonstrates that although the results are somewhat similar, the highest percentage of statements, that is, 36%, n=35 provided extensive detail of how the PDG was invested and monitored by the sample of primary and secondary educational settings. This was followed by 33% n=32 PDG statements which encompassed limited information and 28% some detail.

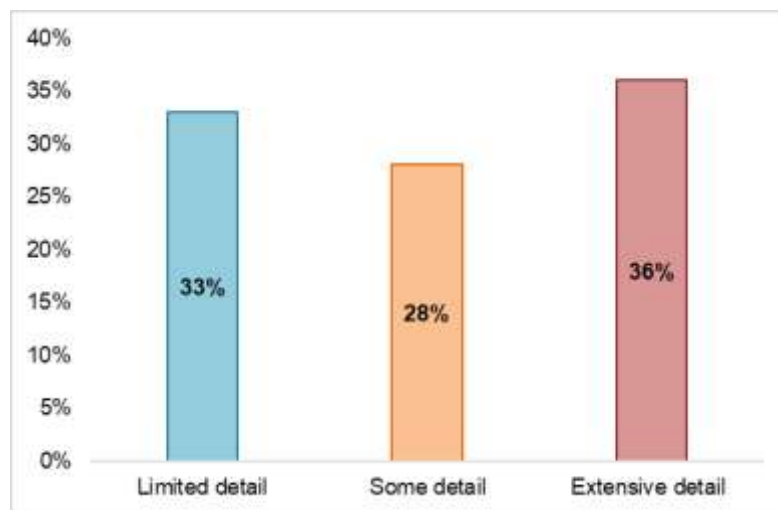


Figure 5 Percentage of PDG statements according to the level of detail provided on the statements by primary and secondary educational settings (phase 1)

Areas covered in statements

The results in Figure 6 illustrate that a large minority of the PDG statements (49%, n=48) either mentioned or provided information related to the allocation of funds for EYPDG interventions. Furthermore, the findings indicate that the PDG statements included information related to other grants, that is, the PDG-LAC (13%, n=13), the Professional Learning Grant (PLG) (12%, n=12), the Education Improvement Grant (EIG) (15%, n=15), the Recruit, Recover, Raise Standards (RRRs) grant (5%, n=5) and the Accelerated Learning Programme grant (ALP) (3%, n=3).

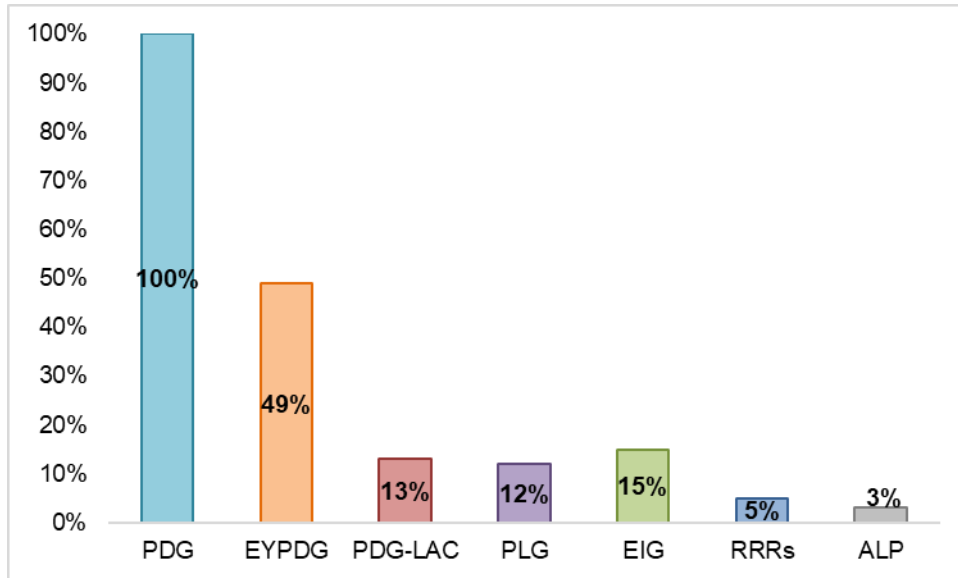


Figure 6 Percentage of PDG statements according to information provided on grants in the statements (phase 1)

Academic year covered in the statement

Figure 7 indicates that nearly half of this sample (54%, n=52) had a PDG statement for the academic year 2023/24, uploaded on their official website. A small majority of statements i.e., 18%, n=17, were out of date (i.e., from the academic year 2022/23 and earlier). This included the statements clustered under the 'other' category as the statements were published earlier than the academic year 2018/19.

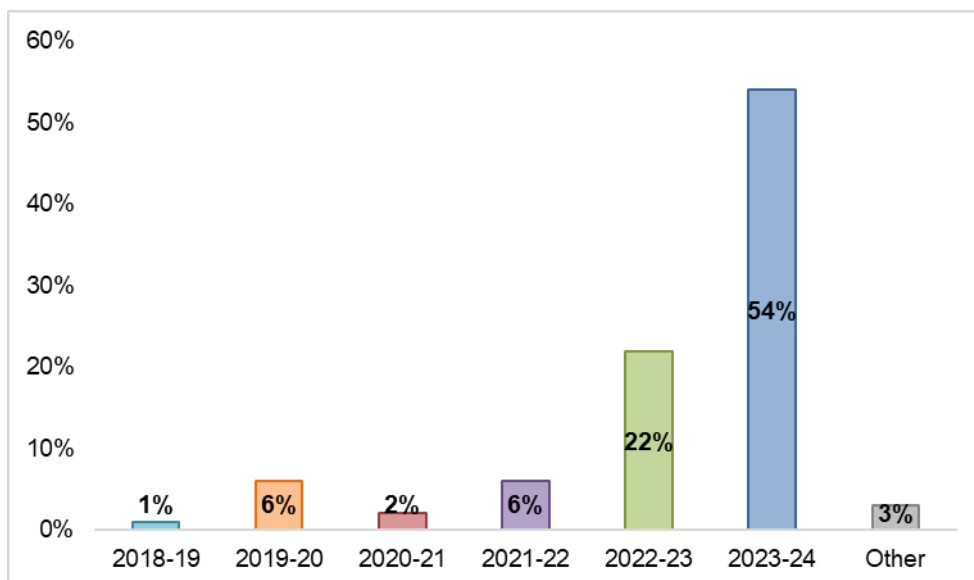


Figure 7 Percentage of PDG statements according to the academic years covered in the PDG statement (phase 1)

Review of outcomes

In addition, examining whether the PDG statements included a review of the outcomes from the previous academic year was part of the current study documentary analysis. The results indicate that a majority of statements (69%, n=67) did not review the outcomes from the previous academic year and 31%, n=30 of the statements had reviewed the outcomes.

The PDG spending profile

This sub-section explores how the primary and secondary educational settings in this study sample have invested their PDG spending, if a tiered approach¹² to spending has been adopted and how the funds have been distributed.

Under or overspend

In this sample, an overwhelming majority of the primary and secondary educational settings (97%, n=94) have reported the spending profile of the grant in their PDG statements. It was noted that to provide the necessary interventions, a negligible number of educational settings (7%, n=7) had to spend more than the expected or allotted through PDG. The amount of money overspent ranged from £95 to £32,215. According to the information provided in certain PDG statements, the additional resources were taken from other sources of funding, or they were subsidised by the educational settings. In contrast, a negligible number of educational settings (9%, n=8), spent less than the allotted PDG amount; the amount of money under spent ranged from between £50 to £6,400.

Tiered approach

The use of a tiered approach to report the PDG intended spend findings was assessed (Figure 8). A majority of statements (62%, n=60) did not contain information giving a breakdown of the spending into learning and teaching, community focused schools, and wider strategies as encouraged by the Welsh Government's template, while 38% n=37 did provide this information. Nonetheless, out of 37 educational settings that used the tiered approach, 19% (n=7) did not provide the financial information in each category. In terms of distribution of funds among the three categories, the results in Figure 8 demonstrates that on an average 79% of PDG funding was allocated to learning and teaching interventions, 7% was allocated to community focused school interventions and 17% was allocated to wider strategies.

¹² The tiered approach is presented in the [Annex 1: Pupil Development Grant School Statement template](#).

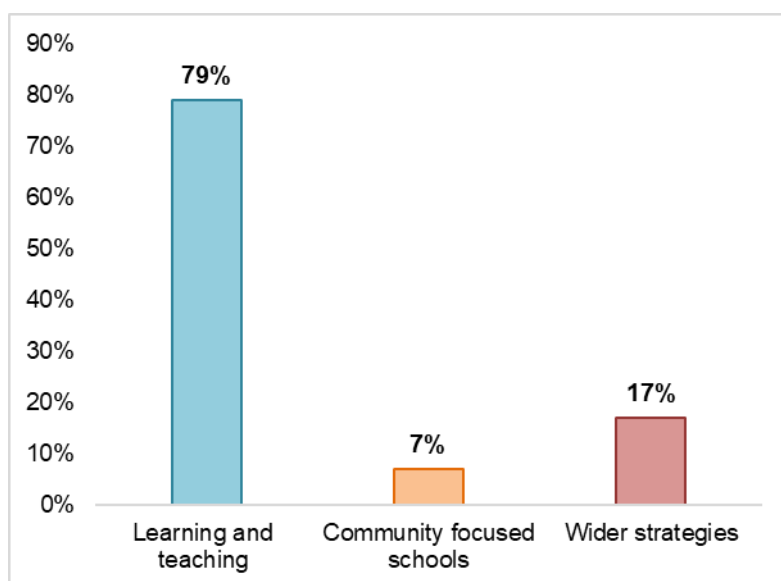


Figure 8 Percentage of PDG statements according to the distribution of PDG funding using the tiered approach by primary and secondary educational settings (phase 1)

Challenges and interventions

This sub-section presents the challenges that have been identified by the sample of primary and secondary educational settings and, via the use of PDG, the interventions, approaches and programmes they have invested in to overcome these specific challenges. Finally, the sample was split into below and above national average for percentage of eFSM to determine if there are any differences in how PDG funding is invested.

Challenges identified

The challenges cited reported by a substantial minority of primary and secondary educational settings in the PDG statements were around social and emotional health/wellbeing (30%, n=29) (Figure 9). Attainment in reading was reported by a minority (27%, n=26), general attainment by a minority (26%, n=25) and maths/numeracy attainment by a minority (21%, n=20).

In the current research, the challenges that were broader than mental health, were unlikely to require clinical response and included social and emotional health and wider wellbeing and these have been grouped in the social and emotional health/wellbeing category. The reading attainment category encompassed challenges that referred to prior attainment or current performance in reading, English, literacy and phonics. This category was similar to the writing attainment category. The general attainment category included challenges related to attainment, however, no specific subject was specified. Finally, the maths/numeracy attainment category included challenges that referred to prior attainment or current performance in maths and/or numeracy.

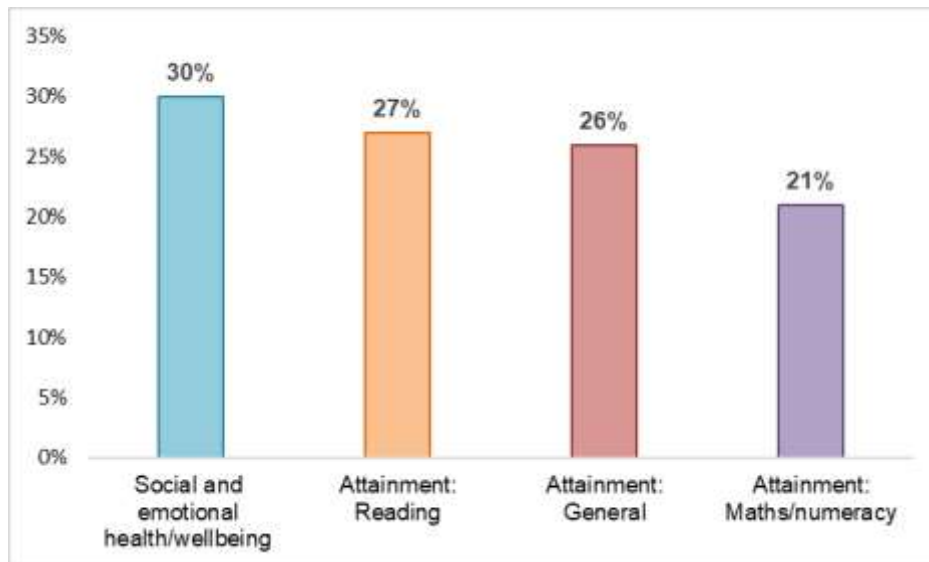


Figure 9 Percentage of PDG statements according to the challenges reported in PDG statements by primary and secondary educational settings (phase 1)

Approaches and interventions

The results indicated that the sample of primary and secondary educational settings allocated PDG funding for a range of interventions and approaches however, the majority of these educational settings focused on implementing literacy interventions (67%, n=65), social and emotional learning (64%, n=62) and numeracy interventions (55%, n=53) (Figure 10). Subsequently, 40% (n=39) of the primary and secondary educational settings have also used the PDG to provide staff professional learning (i.e., staff training/CPD), and 39% (n=38) deployed teaching assistants (TAs) to undertake targeted interventions. The staff training/CPD category encompassed all references to subject-specific training, training related to delivering interventions and safeguarding training. The category termed teaching assistants: targeted interventions included all references to deployment of TAs or higher-level teaching assistants (HLTAs) to undertake unspecified interventions, activities or programmes. The results also revealed that a substantial minority of primary and secondary educational settings (34%, n=33) allocated PDG for parental engagement or family support and enrichment and extra-curricular activities. The parental engagement/family support category includes contact and communications with parents as well as meetings and therapeutic family support. The enrichment/extra-curricular category includes all references to generic enrichment programmes and activities.

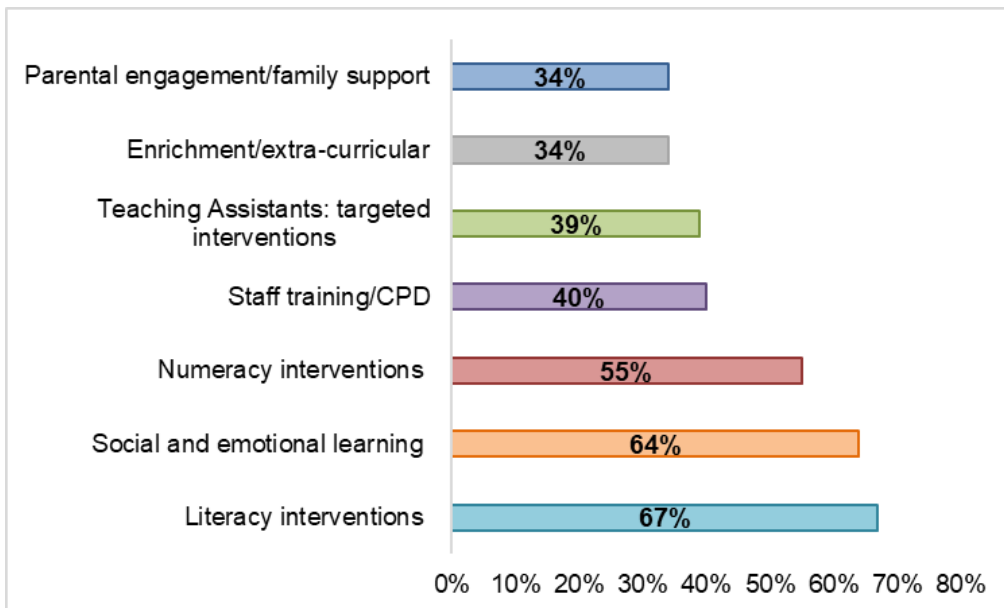


Figure 10 Percentage of PDG statements according to the interventions and approaches as reported by primary and secondary educational settings (phase 1)

Externally provided interventions

The documentary analysis was also used to explore the type of externally provided programmes and interventions that were purchased in the previous academic year 202/23, using the PDG funding (Table 8). A majority of the sample (61%, n=59) included the name/s of such programme(s) in their PDG statement. The findings were grouped into five categories which are presented in Table 8. A significant majority of the primary and secondary educational settings have purchased wellbeing and parental engagement programmes (n=79) followed by literacy programmes (n=59). Under the wellbeing and parental engagement category, the most purchased programmes were ELSA (32%, n=25) and Thrive (22%, n=17). In the literacy category, Read, Write Inc. (15%, n=9) and WellComm (10%, n=6) were most commonly reported by this sample. The name of the programmes, approaches, projects and software mentioned by this sample, along with the frequency and percentage scores are presented in appendix D.

Table 8 Number of PDG statements according to the area of intervention of externally provided programmes purchased by primary and secondary educational settings (phase 1)

Area of programme focus	N
Wellbeing and parental engagement	79
Literacy	59
Numeracy	13
Arts, cultural, extracurricular, and physical activity/ sports	7
Other	1

Comparative analysis

As previously stated, the sample was split into educational settings that had an eFSM percentage below and above the national average. This sample consisted of n=55 educational settings that had a percentage of eFSM lower than the national average (i.e., below 20.3) and n=42 educational settings with a percentage of eFSM above the national average. In terms of interventions and approaches used to address the challenges, the educational settings with an eFSM percentage below the national average have focused the PDG spending mostly on literacy interventions (42%, n=41), numeracy interventions (36%, n=35) and social and emotional learning (36%, n=35). Similarly, educational settings with an eFSM percentage above the national average have predominantly invested the PDG funding in social and emotional learning (28%, n=27) and literacy interventions (26%, n=25). Higher than average eFSM educational settings have also prioritised PDG spend on parental engagement and family support interventions (22%, n=21).

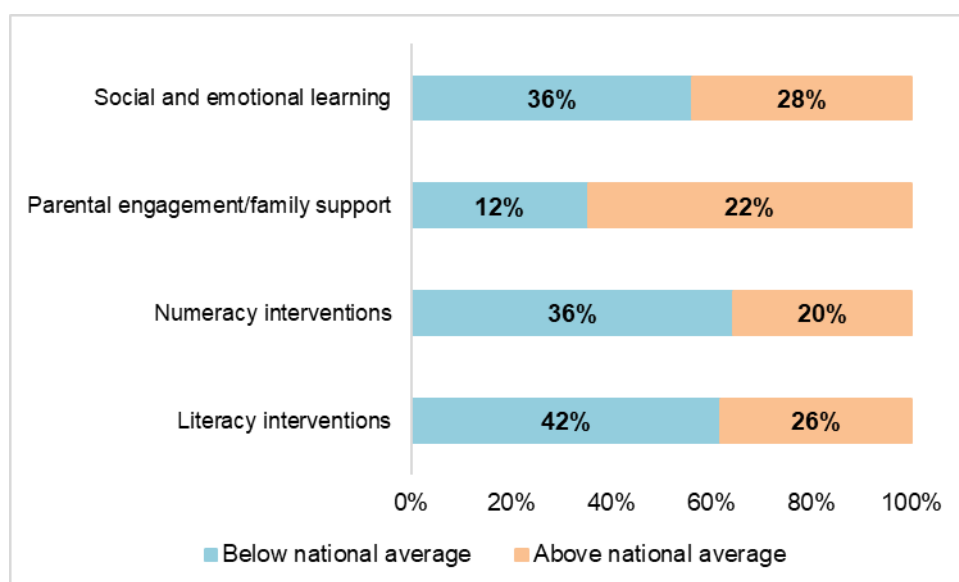


Figure 11 Percentage of interventions used by area of focus with schools with eFSM percentage score below and above the national average (phase 1)

Limitations

This study was the first attempt to collate information on the spending patterns of primary and secondary educational settings with a representative sample of primary and secondary educational settings in Wales who had published their PDG statements online. There are several limitations to the study that need to be considered when interpreting the findings and recommendations.

The PDG statements were accessed between February and March 2024 which is when educational settings were expecting the budgets from Local Authorities. This could have impacted the availability of statements as educational settings were in the process of planning provision. There is also a possibility that some websites were not available due to maintenance or technical issues.

The findings of the documentary analysis are representative of mainstream primary and secondary educational settings that had uploaded their PDG statements on their official website. Recall that 925 (62%) of educational settings had a PDG statement on their official website, and 557 (38%) had no statement published. This means that a substantial minority of settings were not part of this analysis due to the absence of this information. Approaches to encourage the more widespread publishing of the PDG statements may in future enable analysis of other settings, and a more extensive analysis across the sector. The data extraction tool used in this study only identified intended spend reported by educational settings, not the actual spend. Given the challenges educational settings faced within the academic year this may have changed and actual spend may have diverged from that which was intended.

Summary of Phase 1

The analysis of the documentary evidence on PDG spend provided by the sample of schools, identified:

- A substantial minority of schools do not publish a PDG statement on their website.
- For those schools that published statements, a majority only provide some or limited detail on their spend.
- For those schools that published statements, only a substantial minority of schools reviewed the outcomes of the previous years' PDG spend.
- Whilst schools use their PDG in line with the broad remit of the PDG, a majority did not align their spending with the main priorities identified in the Welsh Government PDG Guidance.
- Schools identifies the main challenges they attempt to address in using the PDG are various aspects of attainment (including literacy and numeracy) and the social and emotional health and wellbeing of pupils.
- To address these challenges, schools use a range of attainment and emotional and social focused interventions, including family and parental engagement and extra-curricular provision.
- Many schools use the PDG funding to employ teaching assistants to be involved with these interventions.

4.2 Phase 2: Survey findings

In total, responses from 95 completed questionnaires were analysed. The roles of the participants who completed the online survey are presented in Table 9.

Table 9 Percentage and number of survey respondents according to job role in educational setting (phase 2)

Current role in educational setting	N	%
Headteacher	74	76
Deputy/ Assistant headteacher	5	5
Class teacher	2	2
Other	13	13

Note: Percentages may not sum to 100 due to rounding.

Characteristics of the survey participants

We examined participants' level of responsibility in planning, spending, and evaluating the PDG within their educational settings (Figure 12). Participants could select more than one answer. The data indicate that an overwhelming majority were involved in planning, spending and monitoring of PDG within their setting.

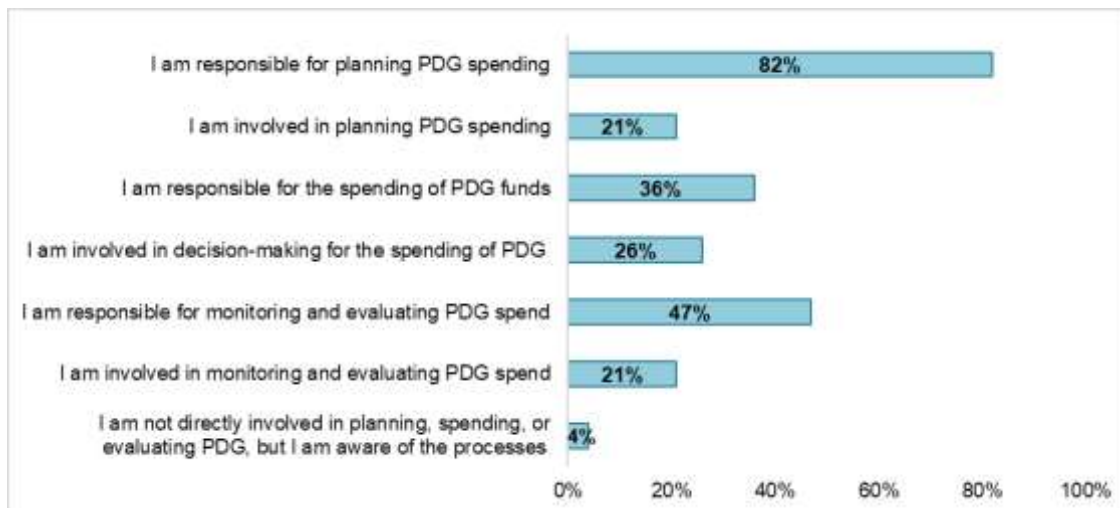


Figure 12 Level of responsibility in planning, spending, and evaluating PDG (phase 2)

The type of educational settings represented by the sample are presented in Table 10.

Table 10 Percentage and number of survey respondents by type of educational setting (phase 2)

Type of educational setting	<i>N</i>	%
Primary schools	65	66
Secondary schools	17	17
Middle/ All-age schools	2	2
Special schools	2	2
PRUs	3	3
Non-maintained nursery	1	1
Other	3	3

Note: Percentages may not sum to 100 due to rounding.

The findings in Table 11 show the number of learners in the educational settings represented by the participants.

Table 11 Percentage and number of survey respondents according to the learners on roll for each primary and secondary educational setting (phase 2)

Number of learners	<i>N</i>	%
0-60	2	2
61-150	16	16
151-400	43	44
401-800	19	19
801-1,200	8	8
1,201-1,600	6	6

Note: Percentages may not sum to 100 due to rounding.

We also asked participants about the number of eFSM learners in their educational settings (Table 12). The results in Table 12 indicated that practitioners working in educational settings with an eFSM percentage above the national average were more likely to contribute to the current study.

Table 12 Percentage and number of survey respondents according to the percentage of eFSM learners in primary and secondary educational settings (phase 2)

Percentage of eFSM	N	%
0-5%	3	3
6-10%	5	5
11-15%	12	12
16-20%	13	13
21-30%	16	16
31-40%	12	12
41-50%	13	13
51-60%	7	7

Note: Percentages may not sum to 100 due to rounding.

Table 13 Percentage and number of educational settings by location* (phase 2)

Location of setting	N	%
North Wales	22	22
Mid Wales	4	4
Southwest Wales	18	18
Southeast Wales	50	51

Note: Percentages may not sum to 100 due to rounding. *Appendix A.2 contains more details on the educational settings by location.

The results for the survey themes on targeting and planning, using the PDG, and monitoring and governance are presented below in this order. To restate, the percentage scores for the survey results are reported according to the following categories:

- Negligible (0-9%)
- Small minority (10-19%)
- Minority (20-29%)
- Substantial minority (30-39%)
- Large minority (40-49%)
- Nearly half (50-59%)
- Majority (60-69%)
- Significant majority (70-79%)
- Large majority (80-89%):
- Overwhelming majority (90-99%):
- All (100%)

4.2.1 Targeting and planning PDG

This theme aimed to understand how PDG funding is planned and targeted within educational settings. The questions included in this section explored the planning process and the specific targeting of funds as well as strategies and criteria used for PDG allocation.

Part A: Planning PDG spend

First, the participants were asked to rate how important certain factors were in the planning process of the PDG, on a 4-point Likert scale from very important (1) to not important (4). The option 'not applicable' was also included in this question. Figure 13 shows that social and emotional wellbeing (89%, n=85) and learner attainment levels (70%, n=67) were rated as very important by the survey respondents. Subsequently, learners with low parental engagement were considered a very important factor in the PDG planning process by half (50%, n=48) of the respondents. Additional factors reported in the open-ended question, under the 'other' category that were considered very important, included attendance, learners' family life, learners' progress, ALN needs, and child protection and safeguarding.

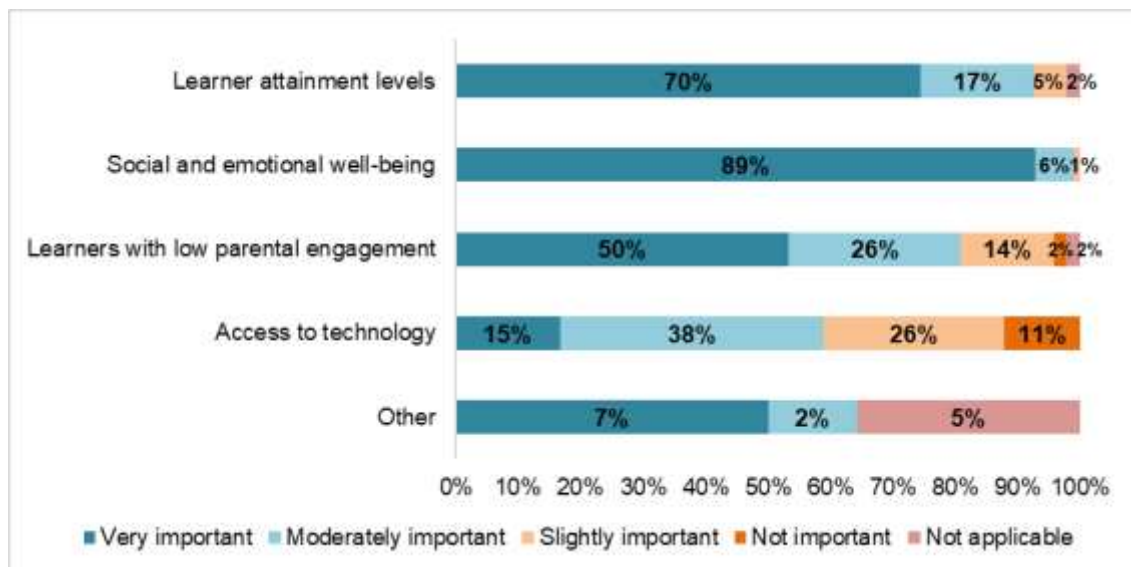


Figure 13 Percentage of respondents' ratings on factors influencing planning of PDG spend in educational settings (phase 2)

Resources used

Our data revealed that participants are using a wide range of resources to plan the PDG spending. Figure 14 shows the participants usefulness ratings of the different resources available to support planning, spending and monitoring of PDG. The findings indicated that the resources available are useful in the large majority of cases. The results also showed that when we combine *very useful* and *moderately useful* categories, a majority (63%) indicated Welsh government guidance, and

nearly half indicated Estyn guidance, professional networks, peer support and Local authority, as useful. Our data also show that a negligible percentage of schools find other forms of resources very useful.

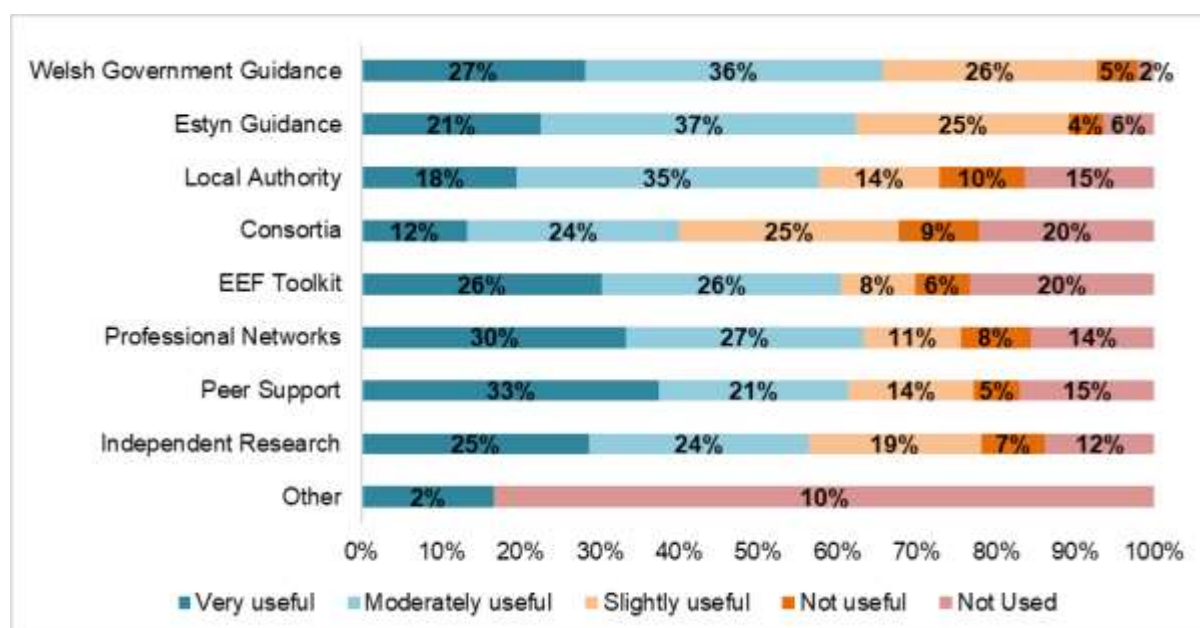


Figure 14 Percentage of respondents' ratings on the usefulness of resources for planning PDG spend (phase 2)

Long term spending plan

Next, the participants were asked if PDG spending was part of a long-term strategic plan. The findings showed that 59% (n=58) answered 'yes' and 31% (n=30) answered 'no'. Participants who answered, 'yes' to the question, 'Is your PDG spending part of a long-term strategic plan?' were asked to supplement their answer by briefly describing their long-term strategic approach. A total of n=58 participants provided a response to this question. From the additional information provided by respondents, five main themes were identified: (i) wellbeing support; (ii) staffing and training; (iii) academic support; (iv) inclusive practices; and (v) long-term planning in alignment with School Improvement Plans. While this section is around targeting and planning participants discussed where the PDG is actually spent.

Wellbeing support

A large minority of respondents (45%, n=25 of 58 participants) emphasised the importance of using PDG funds to support the emotional health and wellbeing of learners. Participants reported that their educational setting invested in intervention programmes aimed at emotional self-regulation and health and wellbeing. A small number (5%, n=3 of 58 participants) emphasised that addressing the wellbeing needs of learners took priority.

“The school recognises that wellbeing is central to everything and without provisions to support the emotional health and wellbeing of pupils nothing else is effective.” (Participant 25)

Staffing and training

A small minority of the respondents (14%, n=8 of 58) reported that PDG funds were specifically used to maintain staff to support wellbeing and social and emotional development interventions and academic development.

“PDG at my school is fully spent on staffing.” (Participant 44)

“PDG is used to maintain staffing levels. Should PDG go, it would be disastrous in schools. We would effectively lose 8 TAs.” (Participant 75)

Academic support

A small minority of the participants (20%, n=11 of 58) reported that PDG funds were spent on staffing academic development particularly in literacy and numeracy skills. This includes interventions led by teaching assistants.

“To ensure all pupils’ wellbeing is supported and then high-quality literacy and numeracy provision is in place.” (Participant 38)

“Developing the attainment of vulnerable and disadvantaged pupils through literacy and numeracy skills.” (Participant 43)

Inclusive practices

It was clear from the data that there is a commitment to develop and sustain provision to meet the diverse needs of learners, with a specific focus on community and family engagement. A small minority of the respondents (14%, n=8 of 58) highlighted the importance of inclusivity and providing the best provision for all learners within their educational settings, especially supporting learners from challenging socio-economic backgrounds. Also, a small minority of respondents (13%, n=7 of 58) reported spending PDG funds on employing additional staff. The role of these additional staff would be to connect with and engage families and community, such as family engagement officers, wellbeing managers, emotional learning support assistants, and family liaison officers.

“PDG is inherently linked to the long-term programmes and development for SEBD¹³ strategies alongside wellbeing - given our cohort, these are the biggest barriers to attainment and have to be our priority.” (Participant 47)

¹³ Social Emotional Behavioural Difficulties

Respondents described the importance of having the resources to support the needs of vulnerable and disadvantaged learners and helping to reduce barriers and the impact of poverty.

“Ensuring educational and welfare support for these pupils and others who are in households where money is very scarce even though the parents has (sic.) 2 or 3 jobs.” (Participant 88)

Long-term planning in alignment with School Improvement Plans

A small minority of respondents (17%, n=9 of 58) reported that their PDG was directly aligned with long-term school development plans, strategic goals and/or policies to tackle the impact of poverty on learner outcomes.

“The PDG plan sits within our Federation Improvement Plan, to me the plans align, they are not separate from each other.” (Participant 80)

“Reducing the impact poverty has on wellbeing, attendance and attainment in line with the national mission.” (Participant 71)

“Included in 3yr development plan as want to ensure continuity and maximise impact.” (Participant 42)

Participants who answered ‘no’ to the question, “*Is your PDG spending part of a long-term strategic plan?*” were asked to elaborate on their answer with comments or thoughts, including any barriers to strategic planning and n=24 participants answered this question. From the information provided, one main theme was identified:

Uncertainty and inconsistency of funding, including the yearly cycle

Nearly half those who elaborated on their answers (58%, n=14 of 24) expressed significant concerns about the inconsistency and unpredictability of funding, particularly with regards to the PDG. This uncertainty makes it challenging to plan for the long term as funding levels vary from year to year and are often not confirmed until the last minute. Respondents talked about the challenge of sustaining projects and activities due to the annual nature of PDG funding, which may not guarantee continuity or long-term impact.

“Uncertainty about level of funding makes long-term planning challenging. We are considering part of the expenditure for a long-term RADY¹⁴ project, but above this it's not possible to be certain about the level of money from year to year or the buying power as it does not increase with inflation.” (Participant 92)

¹⁴ Raising the Attainment of Disadvantaged Youngsters

“Unsure of the amount and finances change so much year on year. Numbers of eligible children are increasing.” (Participant 60)

“PDG is purely used to balance the budget and maintain sufficient staffing levels to support pupils as identified above.” (Participant 41)

“Plunged into deficit budget 2022/23 - short/midterm financial planning has taken precedence at the expense of quality of education.” (Participant 86)

Part B: Targeting PDG funds

The survey explored whether the participants target specific groups of learners in their PDG planning. The findings indicate that 86% (n=84) target specific groups and 10% do not.

Table 14 shows the response to the question about whether participants target PDG spending specifically at learners who are eligible for Free School Meals (eFSM). The data suggests that a significant majority of respondents (75%, n=71) target the PDG spending on eFSM learners, and a significant minority (12%, n=13) partially targeted this cohort. Table 14 shows that the majority of respondents (87%) focus PDG spending on eFSM learners, either solely or partially. This indicates a significant emphasis on eFSM status in PDG planning.

Table 14 Survey respondents' responses to the survey question of PDG spending targeted specifically at learners eFSM (phase 2)

PDG spending targeted specifically at learners eligible for eFSM	N	%
Yes – we solely target this cohort	71	75
Yes – we partially target this cohort	13	12
No	13	12

Targeting criteria

A further sub question asked participants for more detail on whether other categories of learners were important in decision making in the targeting and spending of PDG in addition to eFSM status. Figure 15 shows that participants used additional categories to help target at a broad section of learners experiencing social, emotional, and mental health needs (85%, n=81), care experienced children (82%, n=78) and learners from low socio-economic backgrounds (79%, n=75). Note that the use of broader categories (such as learners with social, emotional, and mental health needs) does not negate the primary focus on eFSM learners. The high percentage of respondents targeting these broader categories should be understood in the context of the probable significant overlap with eFSM status. We do not have data on whether these categories also overlap with eFSM but it is likely that there is

a substantial overlap of eFSM learners with many of the categories listed in Figure 15.

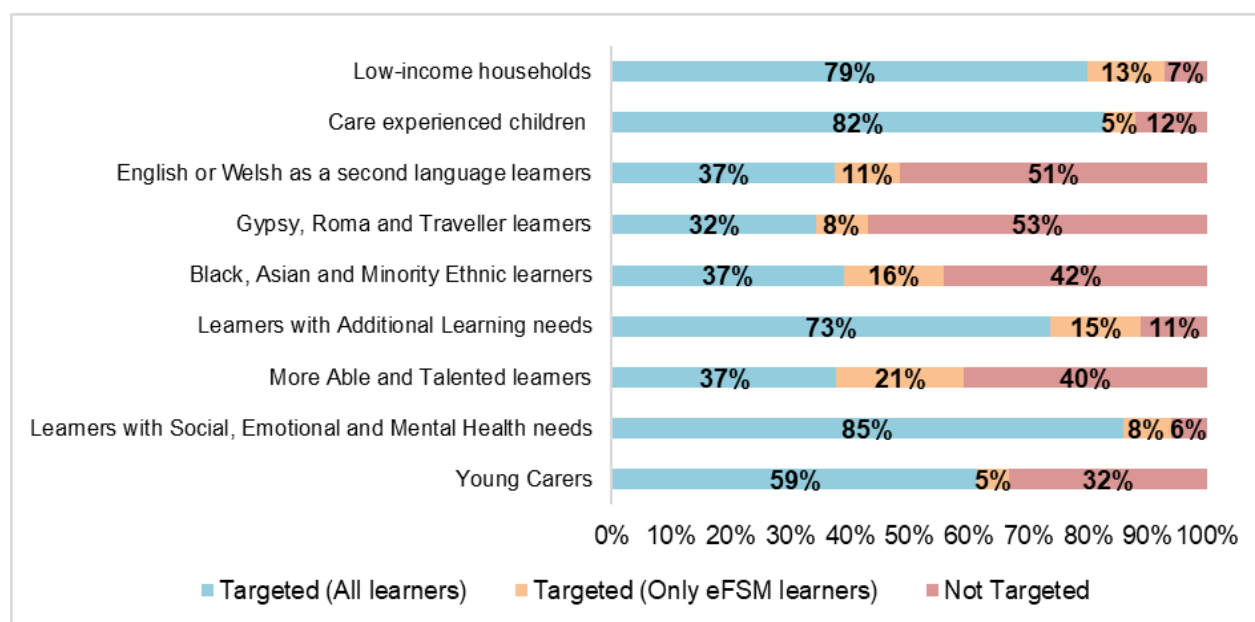


Figure 15 Specific groups targeted in PDG planning (phase 2)

Open ended response to targeting PDG funds

Participants were asked to detail any other specific groups who would be targeted for PDG funding in their educational setting; n=26 out of 95 answered this question. Four core themes were identified from this sub-section: inclusive support for vulnerable learners; trauma and adverse childhood experiences; family support; and ALN. Note that the data reported below refers to only responses from those 26 participants who completed the open-ended question, and percentage scores do not refer to the whole population of survey respondents (n=95).

Inclusive support for vulnerable learners

Of the 26 participants who responded, 96% (n=25 of 26 respondents) of this group who answered the open-ended questions explained that they aimed to support any learner facing challenge and required additional support. This included categorisation of eFSM but also included other classification based on support needs. This theme is corroborated by the survey data shown in Figure 14. This theme highlights schools' commitment to ensuring that they target available funding to support eFSM learners and based on a local assessment of needs.

“Again, core funding is not enough so PDG supports general staffing. Interventions do take place for all learners, where there is a need, irrelevant of vulnerability group.” (Participant 75)

“Our FSM at times has risen to almost 70%, and we know that we have many pupils who are not eFSM, yet they have a high number of adverse childhood experiences [ACEs]. Therefore, we use our PDG to support all learners.” (Participant 3)

“Please be mindful our responses refer to our non-maintained provision and we do not restrict any child accessing early education from any of the provision accessed via the EYPDG. All children are included regardless of their background or economic status.” (Participant 16)

“We try to use the grant to support as many children as possible whilst including support for all FSM pupils.” (Participant 55)

Trauma and adverse childhood experiences

Approximately one third of the respondents (35%, n=9 of the 26) who answered the open-ended questions reported that their target groups for PDG funding in their setting were learners who had experienced trauma, or those who with social and emotional needs regardless of the eFSM status.

“Any pupil that is struggling emotionally or academically. Many of our pupils have ACEs or have experienced trauma but are not 'FSM'. Many of our working families really struggle financially.” (Participant 2)

“ACEs. The majority of my pupils have a number of challenging situations, and we have 84% identified as vulnerable/disadvantaged.” (Participant 68)

Family support

A small percentage of respondents (15%, n=4 of 26) in this group who answered the open-ended questions stated that their educational setting targeted groups who would represent learners from families experiencing other struggles, including financial and those who may not qualify for free school meals but still require assistance due to economic challenges.

“Pupils who have a specific need relating to their home circumstances, e.g. parent in prison, parent with mental health difficulties, parent with a social worker/family worker.” (Participant 69)

“Family support as extremely low level of parenting [...] Extremely low levels of communication on entry [...] Working poor.” (Participant 30)

ALN

A few respondents (11.6%, n=3) of the 26 participants who responded indicated that their educational settings targeted learners with specific learning needs.

“Learners with specific profiles including ASC¹⁵, PD¹⁶.” (Participant 84)

“All our learners have ALN, all have a number of ACEs, all are classed as vulnerable, therefore all planning is done to meet the needs of every cohort.”
(Participant 47)

Tracking strategies

The survey examined strategies used by participants to help analyse and track spending. The strategies included in the survey were around data analysis and tracking, educational and behavioural insights, feedback and collaboration, and learner-centred approaches. In terms of data analysis and tracking, the strategies used by a large majority of participants were internal assessment data (87%, n=83) and monitoring attendance and punctuality records (83%, n=79) (Figure 16). Other strategies employed by a significant majority of respondents were analysis of school-wide data (77%, n=73) and reviewing behaviour logs or pastoral records (74%, n=70) (Figure 16).



Figure 16 The data analysis and tracking strategies survey respondents reported using (phase 2)

Educational and behavioural insights strategies

The findings presented in Figure 17 indicated that all participants employ a range of educational and behavioural insights to identify learners to direct PDG spending. Although all examples of strategies are used by this sample, teacher observations and professional judgment were employed by the overwhelming majority of participants (92%, n=87), and a significant majority also used Individual development plans and assessments of social, emotional and mental health.

¹⁵ Autism Spectrum Condition

¹⁶ Personal Development

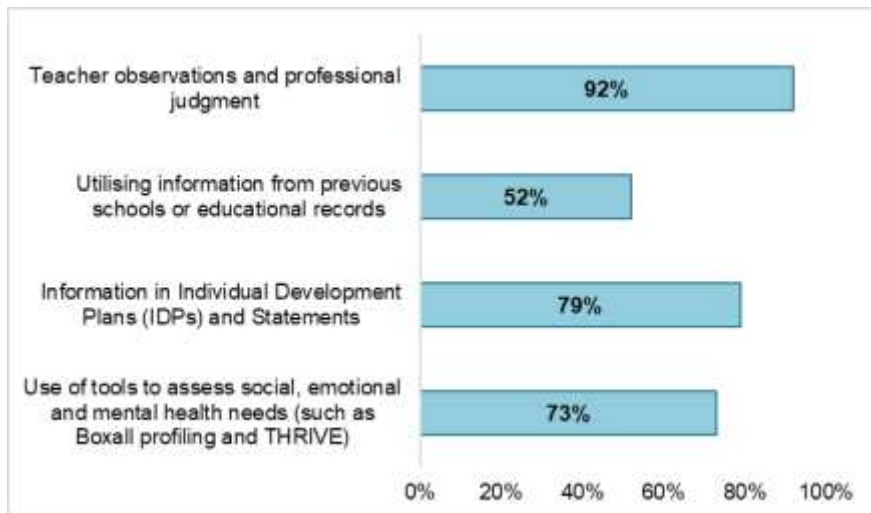


Figure 17 Educational and behavioural insights strategies survey respondents reported employing (phase 2)

Feedback and collaboration strategies

Comparable to the findings presented in Figure 17, the findings presented in Figure 18 indicates that all participants used feedback and collaborated with multiple parties as a strategy to target their PDG spending. Nonetheless, the most common strategies used by an overwhelming majority of the respondents was feedback and input from support staff (91%, n=86), a large majority used engagement with parents and carers for insights into learner backgrounds and needs (88%, n=84) and referrals or reports from external agencies (83%, n=79).

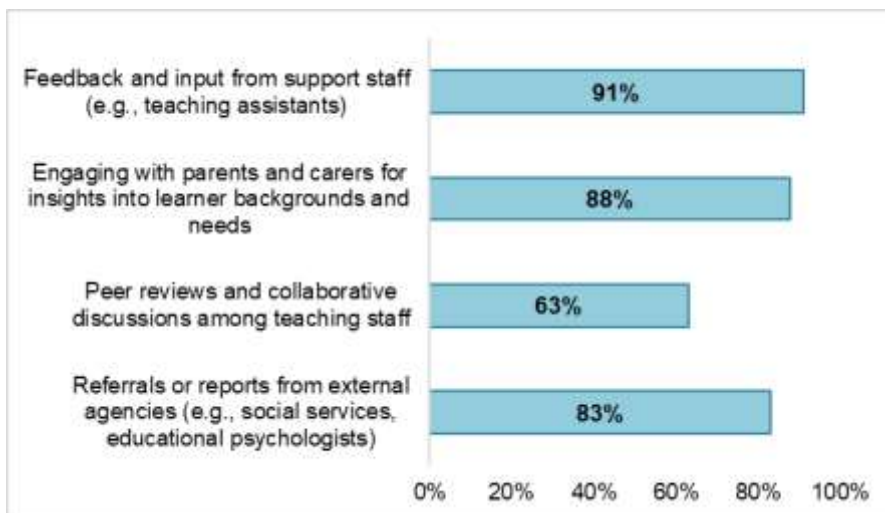


Figure 18 Feedback and collaboration strategies survey respondents reported employing (phase 2)

Learner-centred approaches

In terms of learner-centred approaches, nearly half of participants (52%, n=49) employed student self-assessment and self-reporting tools to target their PDG spending (Figure 19).

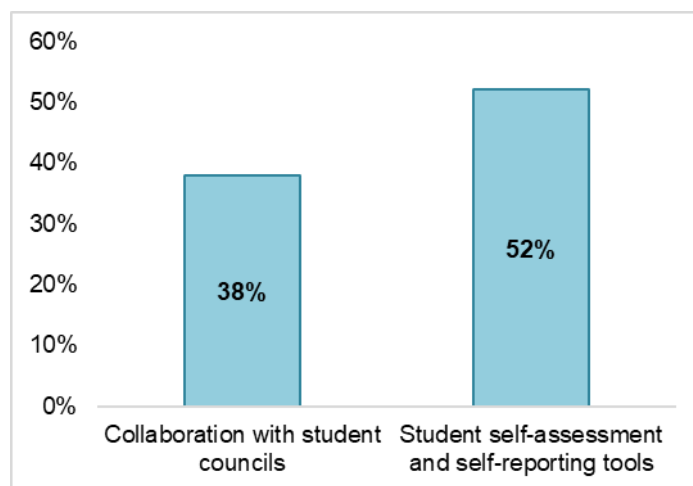


Figure 19 Learner-centred approaches survey respondents reported employing (phase 2)

Open ended comments

Participants were asked to report any other strategies or tools they use to help them target their PDG spending. Note that the data reported below refers to only responses from those 17 participants who completed open ended questions in this section, and percentage scores do not refer to the whole population of survey respondents. Two themes were identified: Professional judgment and Specific tools.

Professional judgement

Approximately two thirds of those who responded to the open-ended questions (65%, n=11 of 17 respondents) explained that their educational settings gathered relevant information on the learner which formed the basis of their decisions on whether they should target their funding at particular learners.

“HT [headteacher] knowledge of families and their personal situations.”
(Participant 14)

Specific tools

In total 35% of those who responded to the open-ended questions (n=3 of 17 respondents) mentioned specific tools such as, RADY, PASS, CATS¹⁷, ELSA, Thrive and speech and language interventions, Solihull (Social + Emotional) and Motional.

¹⁷ Raising the Attainment of Disadvantaged Youngsters (RADY), Pupil Attitudes to Self and School (PASS) and Cognitive Ability Scheme (CATS)

Barriers to effective targeting

Participants were asked an open-ended question on their opinions of barriers they felt impacted on their ability to identify the needs of their learners and target the PDG in their setting (47% n=45 out of 95 respondents) provided an answer to this question. Three themes were identified as follows: inadequate PDG allocation; timing of PDG funding; and parental engagement.

Inadequate funding

Nearly half of those who responded to the open-ended questions (52%, n=23 of 45 respondents) felt that the main barrier to identifying the needs of their learners and targeting PDG provision in their setting was finance. Participants explained that more money is needed to cover the costs of interventions and staffing.

“More money is needed to support these learners effectively. We see the need in some eFSM learners for academic support, emotional support, speech and language etc. The funding per child does not cover the cost of all of these interventions needed.” (Participant 1)

“The very little amount of PDG is not enough to fulfil the need across the school.” (Participant 14)

“Our eFSM numbers do not truly reflect the socio-economic climate of our catchment. We have many families who sit just above this level in the “working poor” zone. They are often described as feeling penalised because they are working. The children in these families are almost “hidden” - in reality these families are often more disadvantaged by poverty.” (Participant 83)

Timing of PDG funding

A small minority of those who responded to the open-ended questions (17%, n=7 of the 45) felt that not having enough time is a barrier to identifying learners’ needs and targeting PDG in their setting.

“Time, lateness of the grant being identified in the budget means you are often unsure as to how much money you have and therefore the priority areas budget.” (Participant 4)

Parental engagement

A small minority (18%, n=8 of the 45 respondents) noted a lack of parental engagement and understanding of the need to continue to register eligibility for free school meals affecting the identification and provision of funding.

“Parental engagement for harder to reach families is getting increasingly difficult.” (Participant 12)

“New UPFSM has confused parents, and many are not bothering to apply for FSM so the school's PDG figures may not be accurate. The school has tried as much as possible to highlight the need to apply to obtain the additional grants they will also be eligible for, but I don't think this is being done. Also, the TP families are not showing on our system as FSM however some of these may be still eligible however because the child gets free meals anyway now, they don't feel the need to see.” (Participant 87)

“Parents understanding the difference between completing the free school meals claim and universal provision of free school meals. Many parents now feel they do not.” (Participant 42)

Part C: Evaluation of planning and targeting

The survey also evaluated the planning and targeting of the PDG. Specifically, the participants were asked to share their thoughts on the broader impact of PDG funding cycles. Interestingly, the findings indicated that the impact of annual allocation cycles positively enhances the evaluation of planning and targeting of the PDG – 32% (n=30) selected ‘somewhat enhances’ and 24% (n=23) chose ‘significantly enhances’ as their answers (Figure 20). However, a substantial minority also indicated that the funding cycles significantly diminishes (18%) or somewhat diminishes (18%) their ability to plan and target.

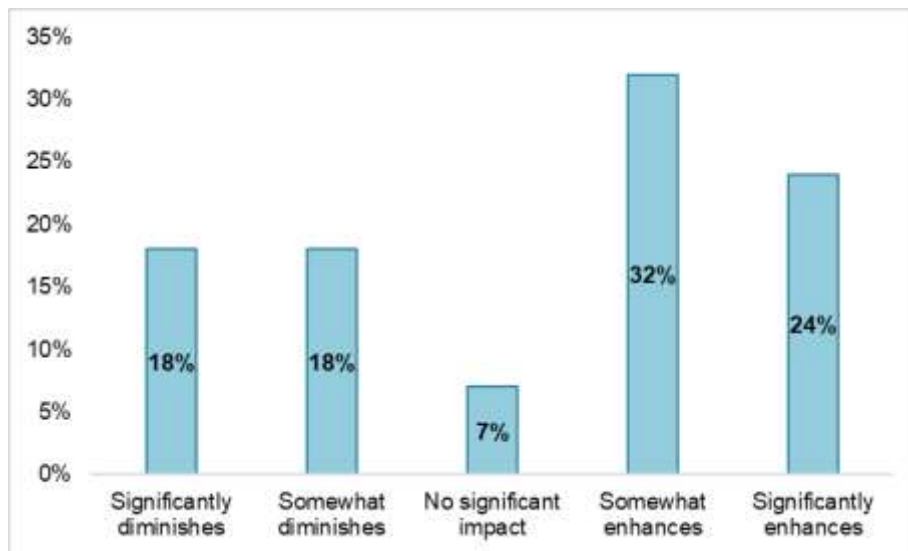


Figure 20 Impact of annual allocation cycle

Subsequently, the survey included an open-ended question that enquired about the broader impact of PDG funding cycles, and participants were asked to specify how their school had allocated PDG funds over the last academic year.

Open ended responses

A total of 37 respondents provided responses to the open-ended questions. Three main themes emerged: timing of the grant, inability to plan strategically, and uncertainty over allocations.

Timing of the grant

A substantial minority of respondents (30% n= 11 of 37) felt that the timing of the grant in the academic year hindered how they were able to use the grant, this included in some cases retaining staff.

“Schools are reluctant to spend money until it arrives in their account. It always arrived halfway through the year!” (Participant 35)

“Would prefer the grant to be lined to the academic year rather than the financial year. Can be a challenge to use quantitative data when completing evaluations in the Spring term.” (Participant 43)

Strategic planning

A minority of the respondents (27% n=10 of 37) felt that the way the PDG grant is allocated means there is a difficulty in planning the spending strategically.

“As the funding is only allocated on an annual basis this makes strategic, long-term planning and staff retention challenging.” (Participant 72)

“Often the amount received is late into school budgets and this can affect strategic planning as we are not always 100% sure how much we will get or when we will get it.” (Participant 23)

“Not knowing if you have enough money to consolidate your priorities and move them on to the next level until nearly the end of your financial year makes strategic planning very difficult. A three-year plan would allow time for strategies to develop, the full impact to be measured and a preparation time for any loss of grant.” (Participant 78)

Uncertainty

A minority (20% n= 7 of the 37 respondents) felt that the annual cycle of the grant created uncertainties in the provision they will be able to deliver and the staff they will be able to retain.

“We need to know how much we are getting over a longer period - so that it is guaranteed and so that we do not have to appoint so many temporary staff.” (Participant 45)

“Figures vary so difficult to have a long-term plan as dependant on amount so lose good staff. Also, SDP¹⁸ and budget dates are not aligned so this impacts adversely” (Participant 31)

4.2.2 Using PDG

We asked the participants about how they use the PDG.

PDG allocated to staff

Figure 21 reveals that the overwhelming majority allocated PDG funds to employ classroom support staff (92%, n=87). Other staffing costs mentioned by this sample in the ‘other’ category were wellbeing teaching assistants, office admin for attendance, mental health practitioner and senior leader time out of class.

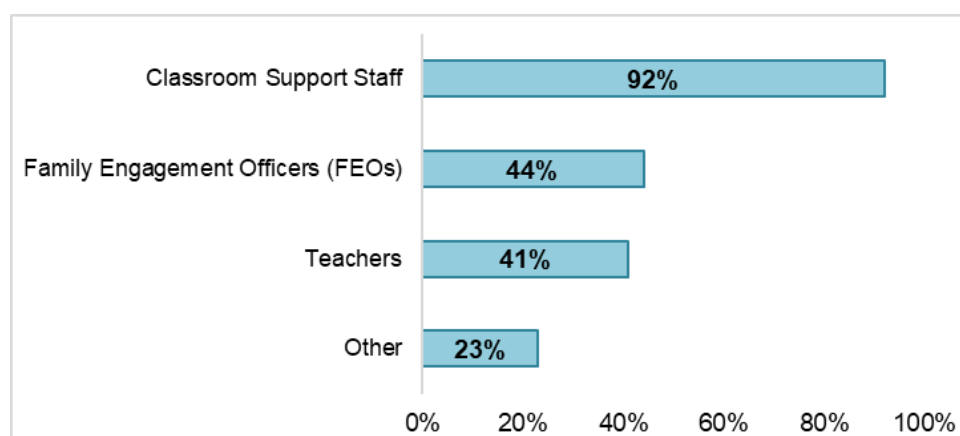


Figure 21 Percentage scores for staff allocation of funding

Open ended responses

Those who stated other: A total of n=28 answered this question. Four themes were identified: specialist external support and training; extra staffing; interventions and resources; and enrichment activities.

Specialist external support and training

A minority of respondents (32%, n=9 of 28) said that they had allocated the funds to cover the costs of specialist external support, and professional development.

“We pay for our own school counsellor 3 days/week; part of the PDG pays for the ICT and Communications lead to drive technological improvements in our learning support in school and at home - this came out of needs identified during the pandemic.” (Participant 79)

¹⁸ School Development Plan

Extra staffing

A minority of respondents (26%, n=7 of 28) said that they had allocated the funds to cover staff costs.

“Office Admin for Attendance.” (Participant 28)

“Senior leadership member - Inclusion and wellbeing.” (Participant 2)

Interventions and resources

A few respondents (19%, n=5 of 28) revealed that they had allocated the funds to pay for interventions and resources.

“Specific relationship building activities e.g. forest schools, pottery, transport.”
(Participant 34)

“Sports coach/booster physical literacy.” (Participant 52)

“A small amount is used on resources to replenish projects such as nurture and interventions e.g., attention autism.” (Participant 15)

Enrichment activities

A negligible (13%, n=4 of 28) indicated that they had allocated the funds to provide learners with enrichment activities.

“Enhanced pupil activities, e.g. educational learning trips, curriculum specialism, funding swimming (a life skill), subsidising vital residential experiences.” (Participant 30)

“Sometimes on outside experiences, e.g. contributing to the finance of educational visits or music/ cultural experiences coming to school.”
(Participant 19)

Subsequently, Figure 22 illustrates that the participants allocated PDG funds for staff development training. Funds were allocated to finance training on social, emotional and mental health needs (78%, n=74) and high-quality teaching strategies (52%, n=49). The participants who responded other (3% n= 7) articulated that they used funding for staff training for social and communication, developing strategies for neurodiversity support, and releasing staff for planning and evaluation.

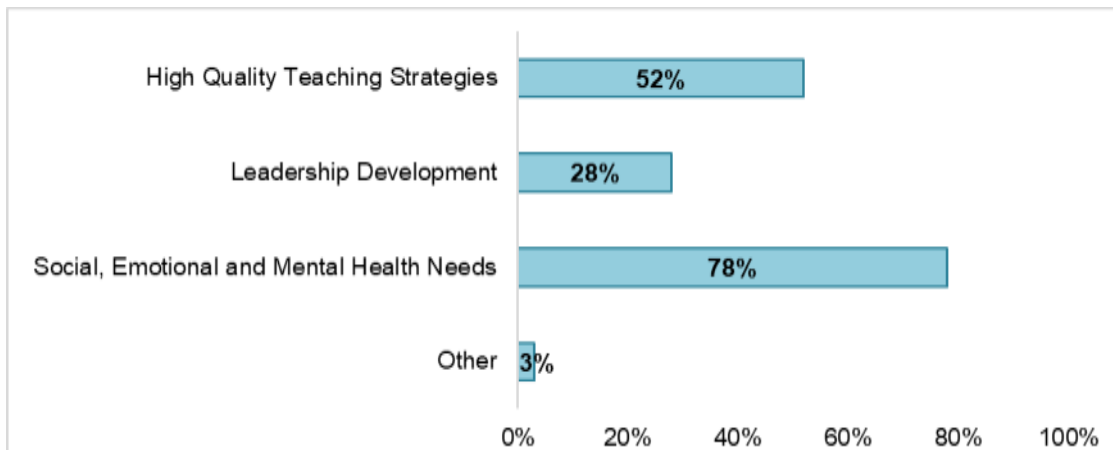


Figure 22 Percentage scores for area(s) of staff development and training

Learner support and interventions

The participants indicated that they used the PDG funds to finance a range of learner support and interventions (Figure 23). The large majority of participants invested in social, emotional and mental health (87%, n=83) and reading and writing (85%, n=81) interventions, followed by ALN support (74%, n=70), numeracy (72%, n=68) and oracy (51%, n=48) interventions. However, the results also show that educational settings do not generally allocate PDG funds for digital literacy interventions (19%, n=18) or support for MAT pupils (20%, n=19). Respondents who selected other (5% n=7) articulated wellbeing and counselling, social and communication, whole school approaches and alternative provision.

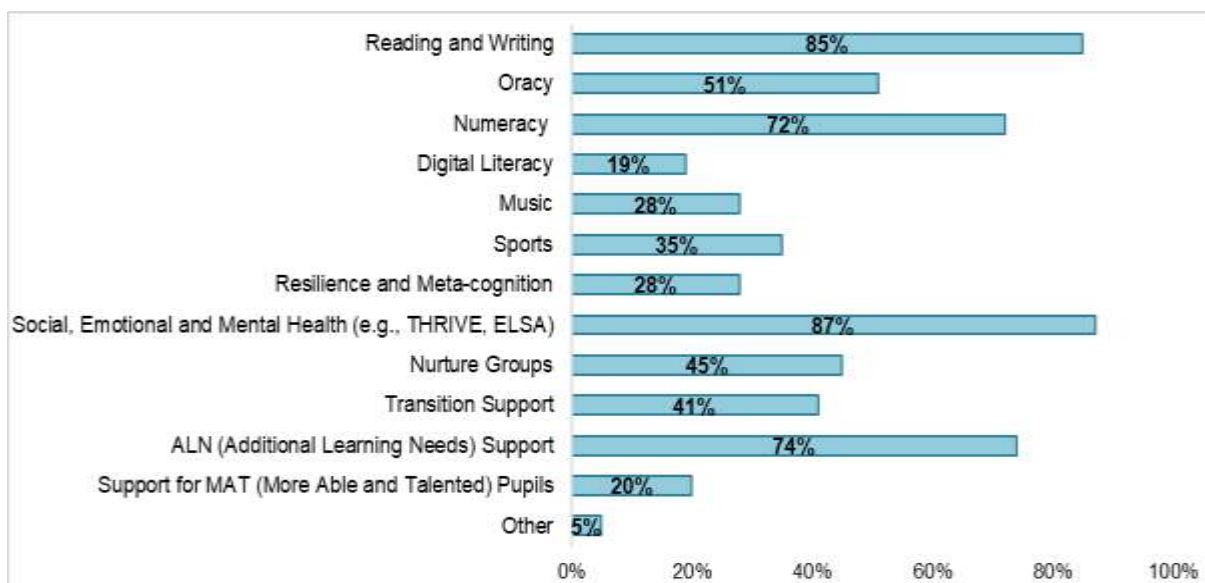


Figure 23 Percentage scores for area(s) of learner support and interventions

Community and family engagement

Concerning allocating PDG funds for community and family engagement, the results show that nearly half of this sample (52%, n=49) financed parent and family engagement initiatives (Figure 24). In contrast, PDG funds were not generally used for community outreach (9%, n=9) programmes.

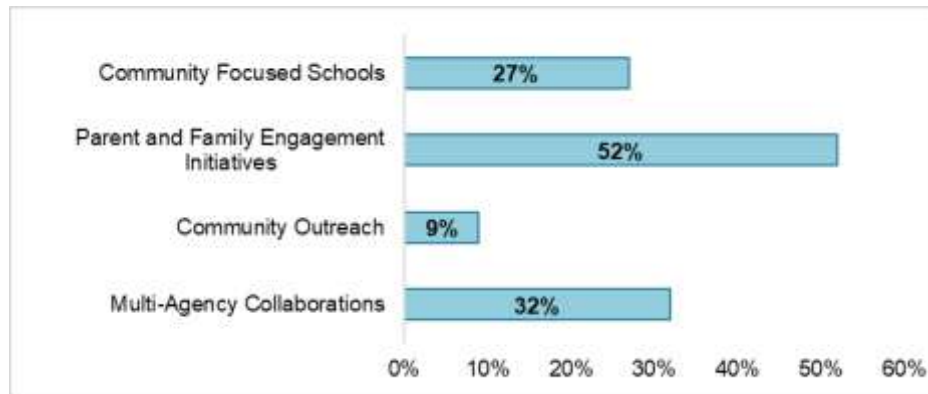


Figure 24 Percentage scores for area(s) of community and family engagement focus

Resources

The findings presented in Figure 25 show that, in terms of educational resources, more than half of this sample allocated PDG funds for classroom resources (58%, n=55). Of the 3% who stated other, development of the sensory room, sport equipment and online learning resources, free for parents to access at home.

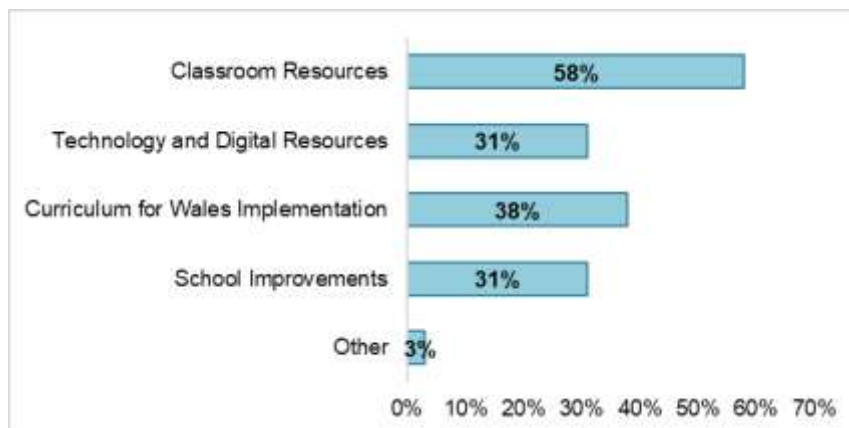


Figure 25 Percentage scores for area(s) of educational resources focus

Costs associated with poverty

PDG funds were allocated to mitigate costs associated with poverty. More than half of this sample indicated that PDG funds were used for provision of learning resources (57%, n=54); this is followed by provision of school uniforms (49%, n=47) (Figure 26). Of the 13% who selected other the respondents also provided additional experiences including extracurricular activities and the associated cost with

transport. A very few respondents used PDG to fund uniforms including physical education clothing.

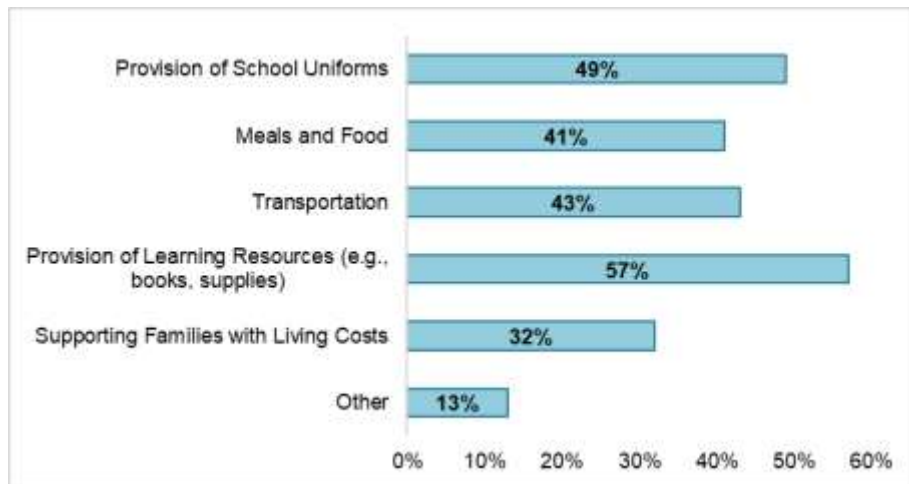


Figure 26 Percentage scores for area(s) of focus associated with poverty

Other expenditures

Respondents were then asked a separate question regarding what other expenditures PDG was used for in their educational settings. Figure 27 shows that nearly half of participants used the funds to invest in school trips (68%, n=65) and extracurricular activities (57%, n=54). PDG was used to support core budgets (40% n= 42%). Of the 4% who selected other, they articulated the PDG was used to support extra curricula participation. One participant revealed that the PDG was used to support core budgets particularly staffing.

Finally, participants were asked about specific services or interventions they have purchased and their intended impact on learners. There was a total of 16 responses.

Extra curricula activities including providing transport was articulated by 5 of the participants, wellbeing was felt to also be impactful as articulated by 4 respondents and finally staff training and staff to deliver interventions was felt to be impactful by 4 of the respondents.

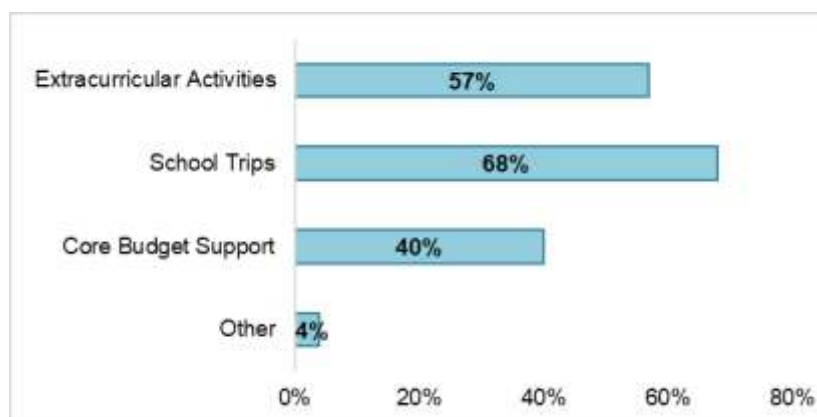


Figure 27 Percentage scores for other expenditures

PDG utilisation in practice

These questions aimed to explore the extent to which PDG is used for this purpose within your setting.

Distribution of PDG funding

The survey encompassed a question that examined the extent to which PDG was used to tackle the impact of poverty on the educational attainment of children from low-income households which is the core function of PDG. These findings are presented in Figure 28, Figure 29, Figure 30, and Figure 31. Figure 28 illustrates the findings related to the allocation of PDG funds beyond its intended purposes. In this sample, 93% (n=89) participants agreed that the current PDG funding levels have not kept pace with the rising costs associated with educational resources and support. Subsequently, a high number of participants acknowledged that they used PDG funding to support the core budget due to financial challenges; 79%, n=75 agreed with this statement.

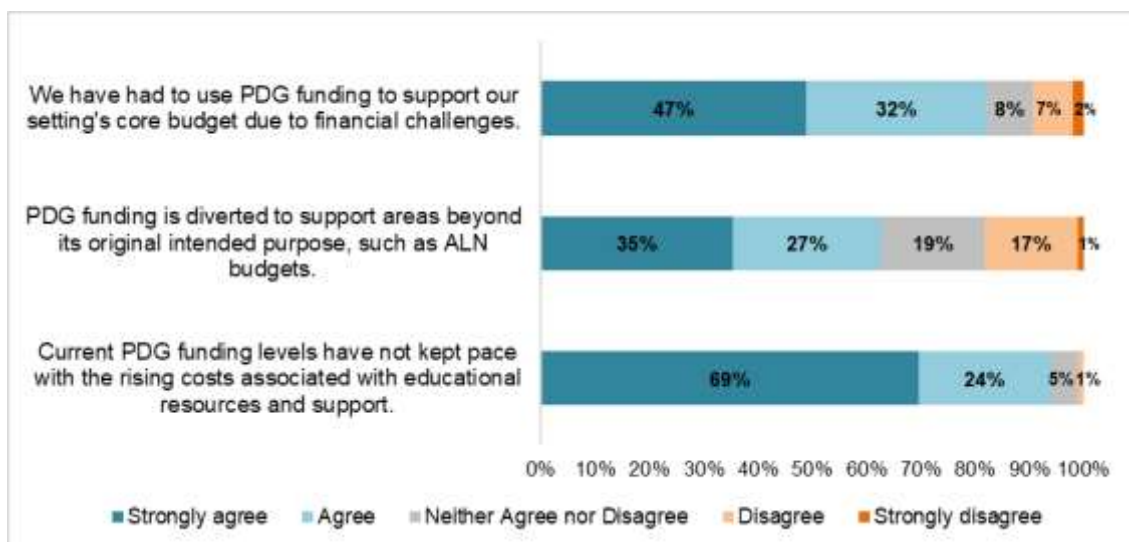


Figure 28 Percentage scores for respondents' reporting on the distribution of PDG funding

Needs addressed via PDG funding

Figure 29 presents the needs PDG funding is used to address. An overwhelming majority of participants agreed (98%, n=93) that since the Covid-19 pandemic, learner needs have increased. Furthermore, a substantial minority strongly agreed (37%, n=35) and agreed (36%, n=34) that oftentimes they had to prioritise immediate or short-term needs over long-term educational goals when using the PDG funding. Finally, a minority strongly disagreed (27%, n=26) and around half disagreed (45%, n=43) that their setting's PDG funding was sufficient to meet the identified needs of their eFSM learners.

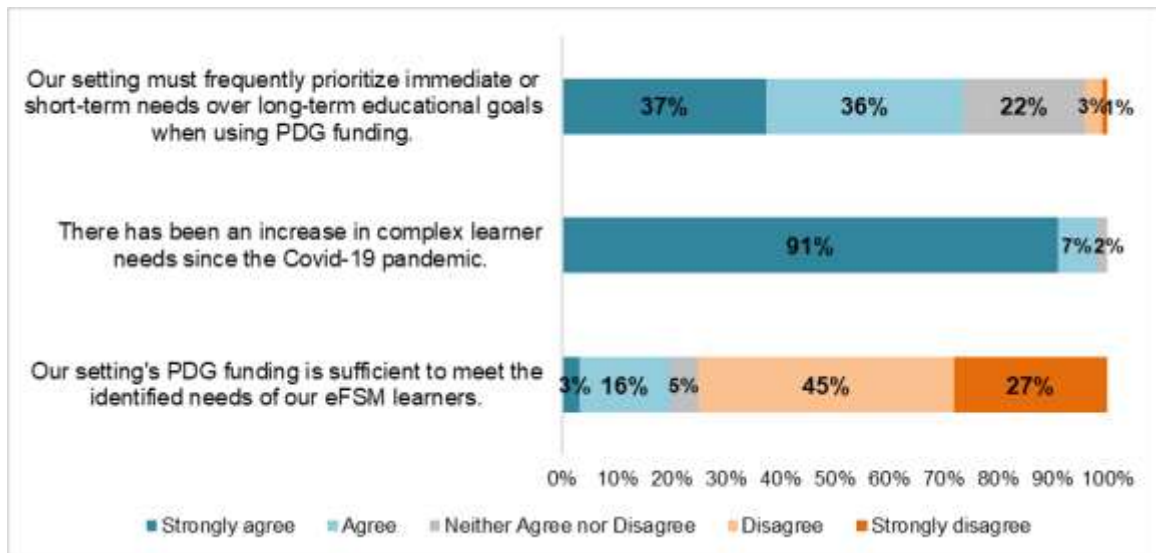


Figure 29 Percentage scores for the needs addressed via PDG funding

Management of PDG funding

Figure 30 portrays the results related to the management of the PDG funding. The findings show that a significant majority of participants have seen measurable improvements in learner outcomes as a direct result of initiatives funded by the PDG; 31%, n=29 strongly agreed and 48%, n=46 agreed with this statement. Participants acknowledged that PDG funding has enabled the implementation of innovative programmes that address the specific needs of eFSM learners; 21%, n=20 strongly agreed and 42%, n=40 agreed with this statement. Equally, nearly half of participants (17%, n=16 strongly agreed and 41%, n=39 agreed) stated that their educational settings were able to sustain key educational services and support despite financial pressures due to effective PDG management.

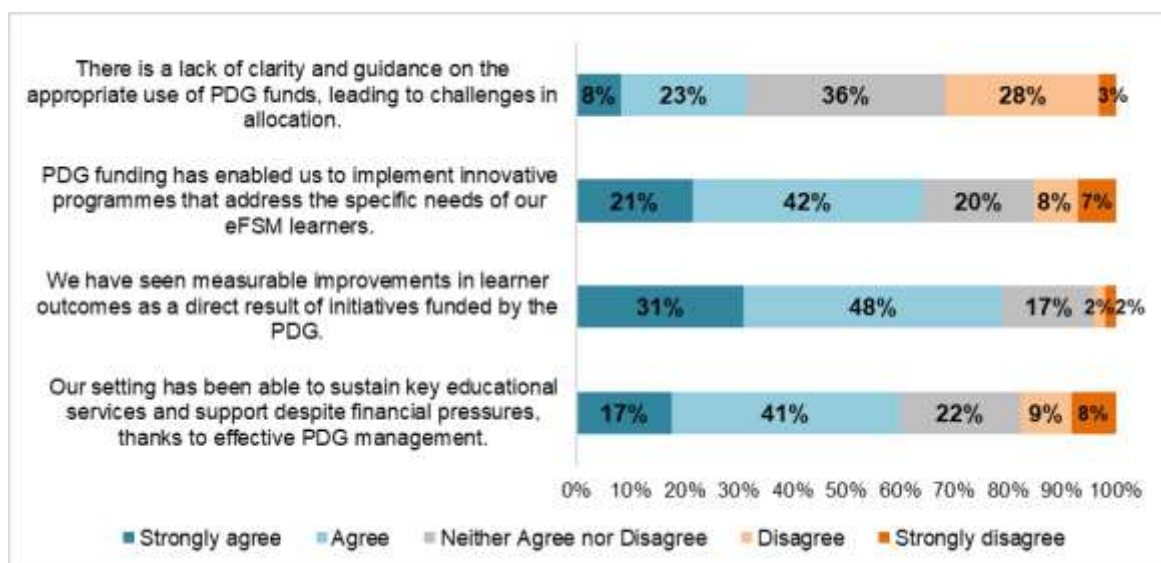


Figure 30 Percentage scores for management of PDG funding

Contextual issues

Figure 31 reports the contextual issues that PDG needs to address. The overwhelming majority of participants have acknowledged that there has been an increase in material poverty and deprivation among their learners; 99% agreed (n=94). Even so, the majority of participants indicated that in their educational settings they have managed to successfully adapt PDG funding strategies to meet the evolving challenges to schools and learners; 19%, n=18 strongly agreed and 47%, n=45 agreed with this statement.

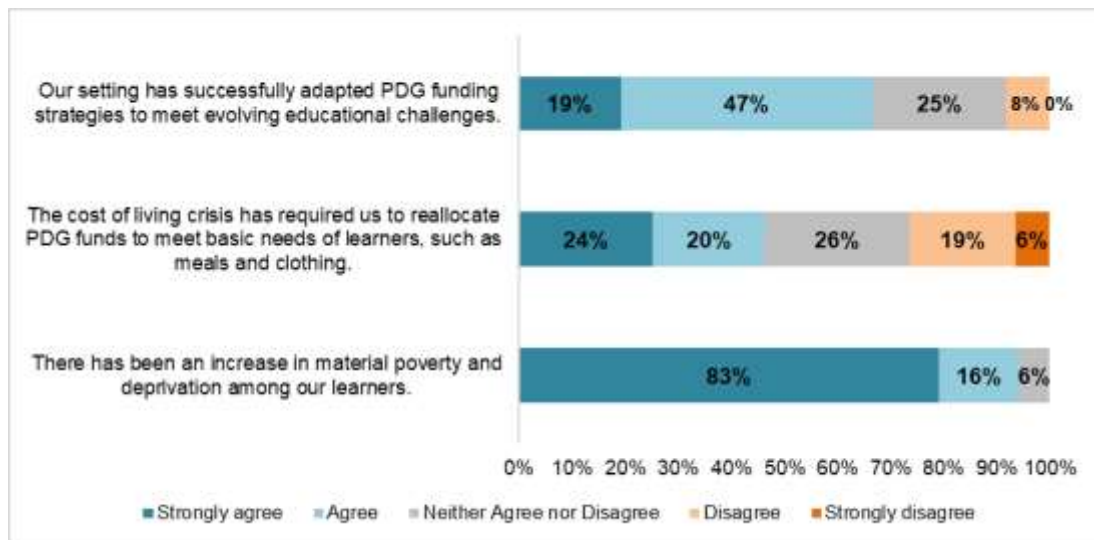


Figure 31 Percentage scores for contextual issues addressed by PDG

Open ended responses

Participants were asked where you indicated any level of agreement or disagreement, to the distribution on funding. A total of 21 participants (20% of 95) responded. Note that the data reported below refers to only responses from those 21 participants who completed open ended questions in this section, and percentage scores do not refer to the whole population of survey respondents. Two main themes were developed: (i) Fear over budget pressures and (ii) Not being able to meet needs.

Fear over budgets

Fear over budgets was discussed by 9 of the 21 respondents (43%). While some were able to use the PDG there was a concern over the future pressures on budgets given the rise in costs and the static funding.

“We have up to now managed to use PDG correctly, my fear for next academic year is that this money will have to be used for core costs as the budget will be insufficient on its own.” (Participant 2)

“Previously we have utilised PDG to support a range of well-being projects and employ 6 support staff for supporting literacy and numeracy deficits. Due to budget cuts our provision has been drastically reduced.” (Participant 83)

Not being able to meet needs

Not able to meet needs, was discussed by 6 of 21 the participants (29%). There was a concern that the needs were growing particularly post COVID-19 and PDG is not able to support this.

“We cannot continue to support our pupils as successfully as we do if there are cuts to PDG or I have to use the grant to prop up staffing costs etc. we will not be able to meet the complex needs of our learners of which the majority live in entrenched poverty and have a high amount of ACE’s.”(Participant 5)

“There has been a significant rise in complex needs and mental health issues both with pupils, but also their families. Post pandemic and cost of living is taking a significant toll of schools. We are expected to do more with much much less! It is not sustainable.” (Participant 26)

4.2.3 Monitoring and governance

This section in the survey focuses on educational settings’ practices in tracking, evaluating, and governing PDG spending.

Designated role

The first question in this section examined if the educational settings represented by the participants had a designated PDG coordinator or an equivalent role. The results show that 48%, n=46 answered ‘yes’ and 48%, n=46 answered ‘no’.

Tracking spending

The survey then enquired about how PDG spending throughout the academic year was tracked. The majority of participants (66%, n=63) indicated that they track it by conducting regular financial reporting while 49% participants (n=47) indicated that the PDG coordinator or leadership team track the PDG expenditure by undertaking periodic reviews (Figure 32). The results also reveal that in a negligible number of cases (6%, n=6) PDG expenditure was not tracked. Of the 11% of respondents who selected other, reviews with head teachers, governors, business managers and improvement partners were articulated.

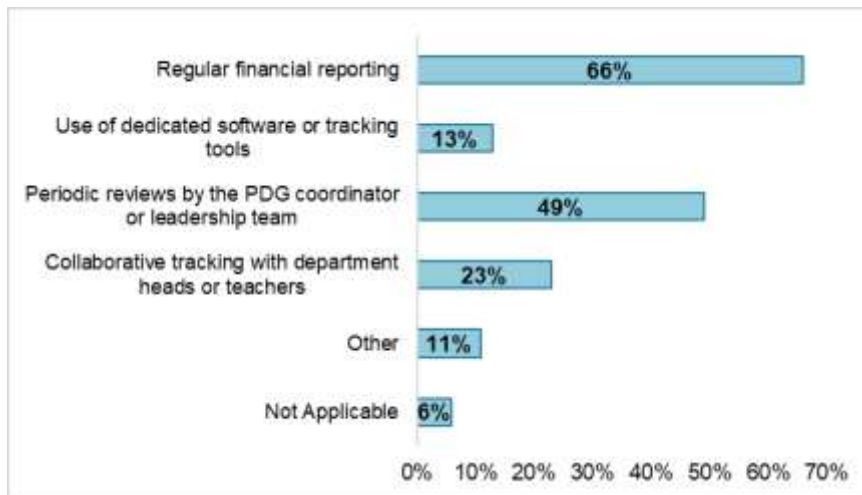


Figure 32 Tracking PDG expenditure

Self-evaluation

The participants were asked if the educational settings they represented self-evaluated the use of PDG funding on a regular basis. Figure 33 demonstrates that nearly half of this sample i.e., 59%, n=56, employed self-evaluation practices systematically.

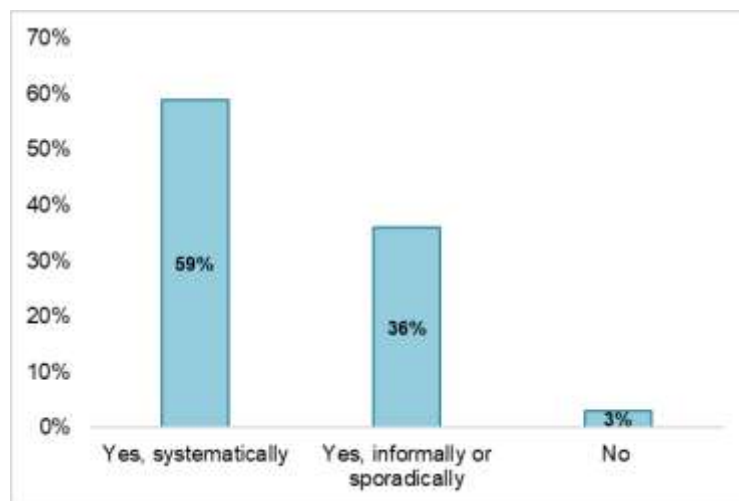


Figure 33 Self-evaluation practices

Frequency of self-evaluation

The participants who provided an affirmative answer for the prior question were asked to reveal how often they self-evaluated the use of PDG funding. The majority of respondents (67%, n=64) revealed that these practices are undertaken on an annual basis. Only 7% (n=7) self-evaluated the use of PDG funding after each major initiative and, in the 'other' category, 8% (n=8) participants indicated that self-evaluation occurs after each term (Figure 34). Of the 17% of the respondents who selected other, 12 articulated that the PDG was reviews half termly or termly.

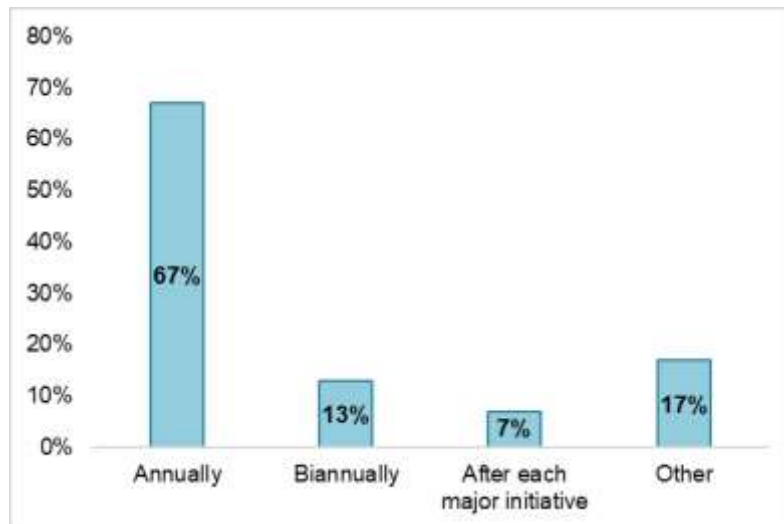


Figure 34 Frequency of self-evaluation

Evaluating impact

The survey instrument examined the approaches used by educational settings to evaluate the impact of PDG-funded initiatives. The results in Figure 35 indicate that the large majority of participants use student performance and progress data analysis (86%, n=82), and feedback from teachers, staff, and students (85%, n=81) to evaluate the impact of PDG. Another approach used by nearly half of respondents was the parental feedback and engagement measures (51%, n=48). Of the 2% n= 5 who selected other detailed progression measures, and comparative data. Local authority advisors and pupil voice were also used.

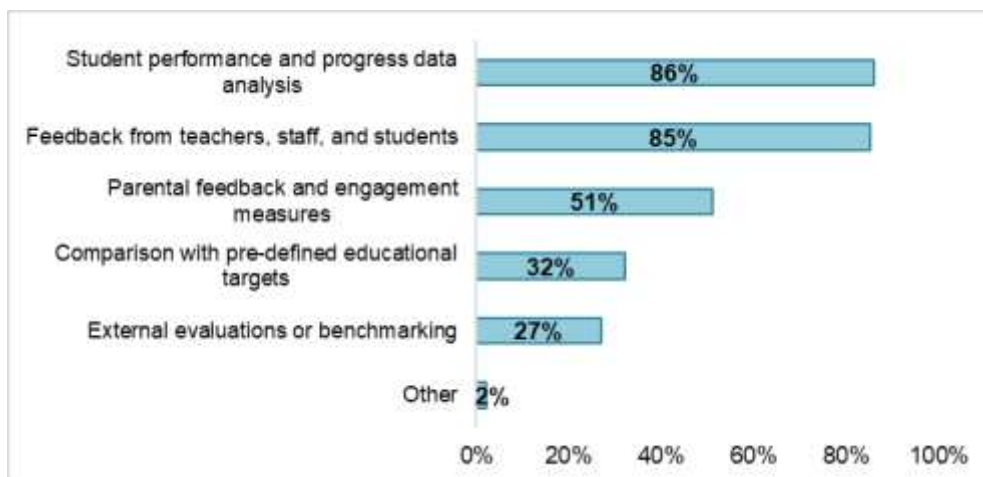


Figure 35 Evaluating impact

Staff confidence in evaluating impact

The participants were asked to indicate how confident the staff felt in their ability to assess the impact of PDG-funded initiatives; nearly half, 54% (n=51), stated that

they were moderately confident (Figure 36). A negligible number of participants, 6% (n=6), stated that the staff did not feel confident at all to conduct this assessment.

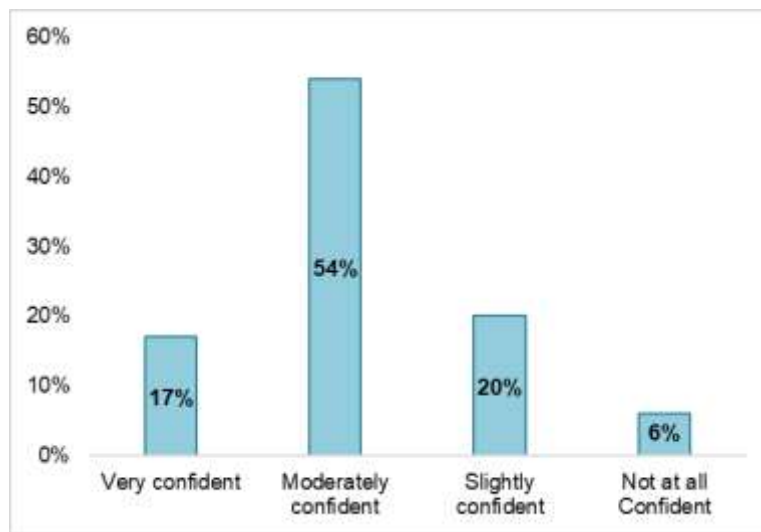


Figure 36 Staff confidence in evaluating impact

Resources used for evaluating the impact of PDG spend

The survey aimed to gain an understanding of the resources, organisations and tools that have supported educational settings in evaluating the effectiveness of PDG spend. The results in Figure 37 are mixed, however it can be stated that Estyn guidance (11%, n=10 selected 'very useful' and 34%, n=32 selected 'moderately useful'), followed by peer support (19%, n=18 selected 'very useful' and 24%, n=23 selected 'moderately useful'), and professional networks (14%, n=13 chose 'very useful' and 28%, n=27 chose 'moderately useful') were regarded as being useful in assessing the effectiveness of PDG spend. Likewise, the results show that a third of participants, 34% (n=32) did not use the information provided by the EEF to evaluate the effectiveness of PDG spend. Of the 2% n = 5 who reported other some were unaware of the resources used to monitor impact, internal data and research was articulated.

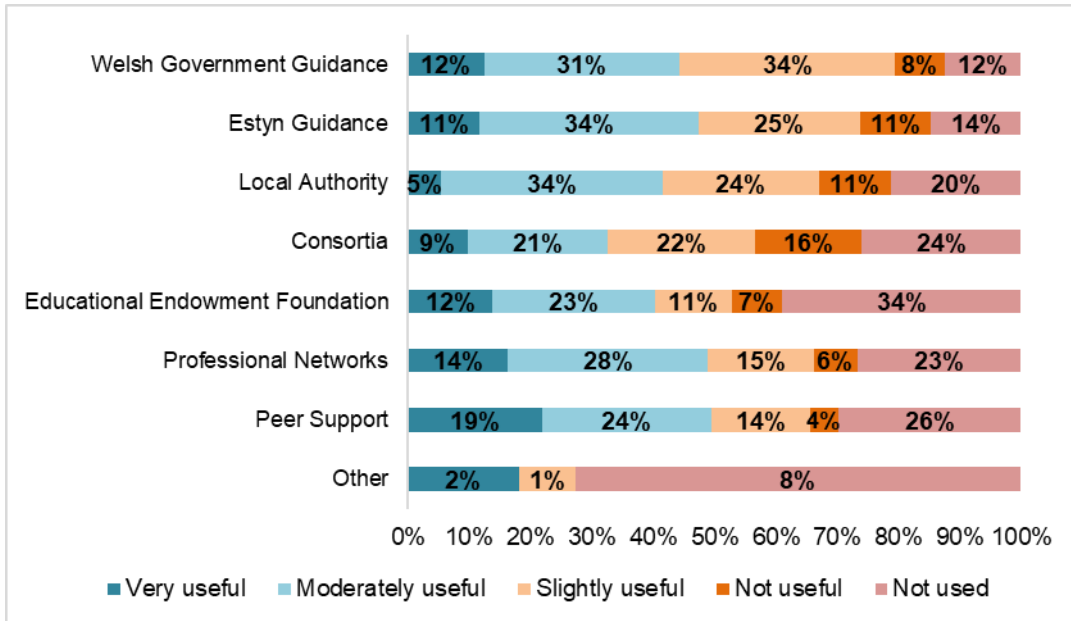


Figure 37 Resources used for evaluating the impact of PDG spend

The participants were asked if they considered that the educational settings had sufficient guidance to help them robustly assess the impact of the PDG spending. Nearly two thirds of respondents, 64% (n=61), provided an affirmative answer whereas the remaining third (33%, n=31) provided a negative answer.

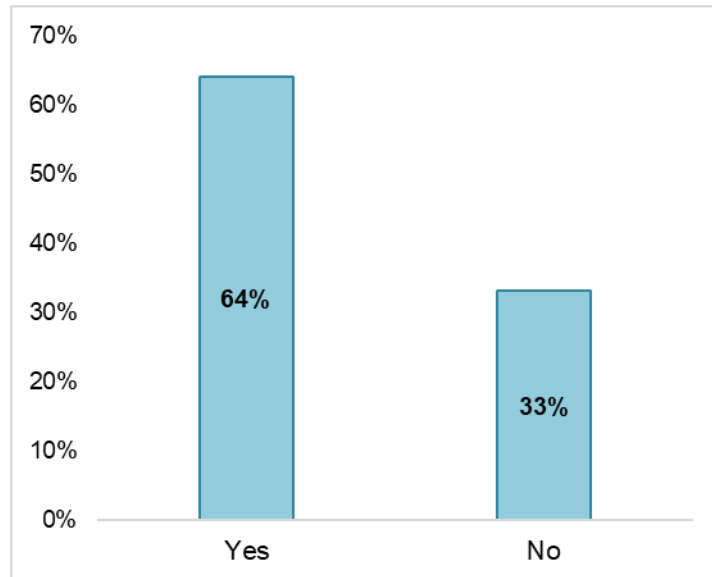


Figure 38 Guidance to support assessing impact

Of the participants that responded to the open-ended question 10 participants elaborated on their answers. They discussed the difficulty assessing softer outcomes, limited support from LAs and a lack of clear guidance that is accessible to schools and clear indicators of impact.

Informing future plans

The participants were asked to state how the PDG self-evaluation results informed their future planning. The findings are displayed in Figure 39, and they reveal that in a significant majority of the cases, the results helped inform the PDG spending plan for the next academic year (78%, n=74), and to adjust ongoing initiatives (63%, n=60). Of the 3% (n = 4) who selected other they articulated that the self-evaluation supports changes to PDG-LAC, which learners will receive emotional support, and staff planning.

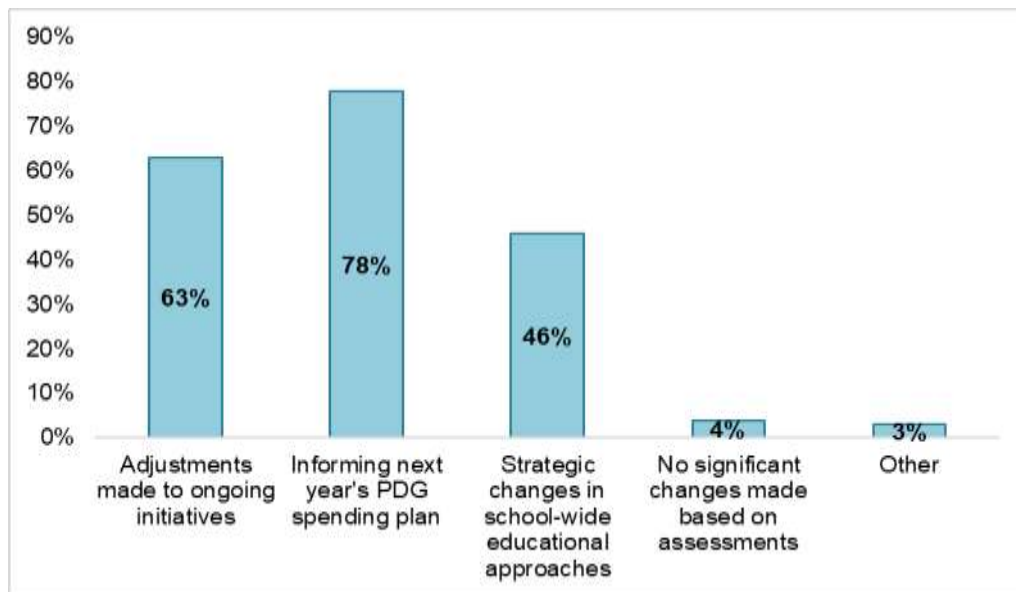


Figure 39 Informing future plans

Ensuring accountability

In response to the question, 'What mechanisms does your school use to promote accountability in PDG spending?', a significant majority of participants disclosed that they report regularly to school governors, boards or consortia (74%, n=70), they publish the PDG school statement on the website (72%, n=68) and they incorporate the PDG spending in the school development plan (71%, n=67) (Figure 40). Of the 2% of respondents (n = 4) who selected other they articulated, bi- annually updated plans, improvement partners and that there was too much accountability.

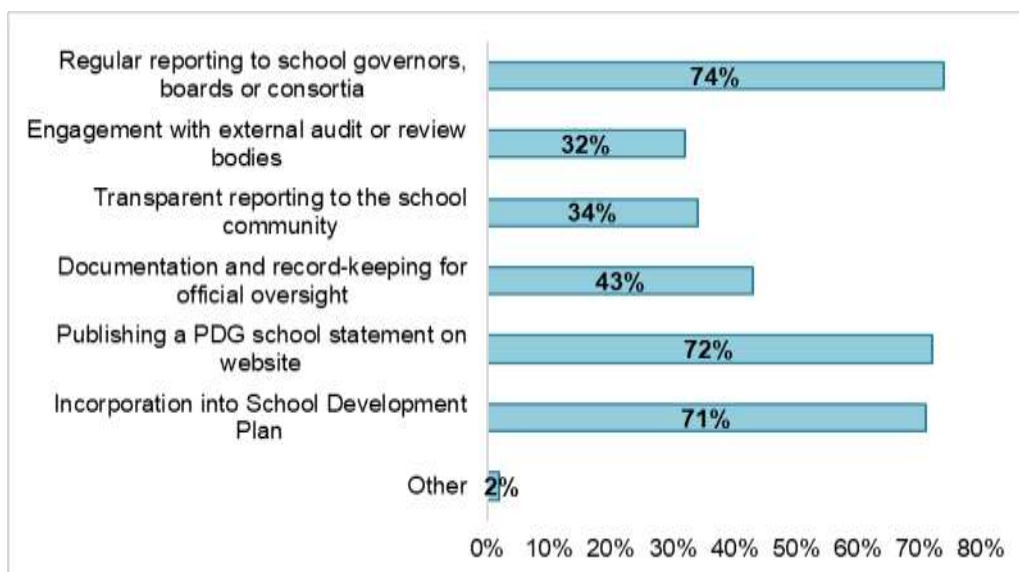


Figure 40 Ensuring accountability

Open ended questions on monitoring and governance

Two open ended questions were developed to understand the participants perspectives on the monitoring and governance. Firstly, participants were asked: Can you tell us about any challenges or obstacles in monitoring and evaluating PDG spending? Note that the data reported below refers to only responses from those 34 (36% of 95 respondents) who completed open ended questions in this section, and percentage scores do not refer to the whole population of survey respondents. This open-ended question this resulted in three themes: Range of the resources used, time to monitor impact, and the change in needs of the learners.

Range of resources used

Range of usage was articulated by 7 of the 34 respondents who provided an answer to this question. Given that PDG covers a wide range of activities, the participants felt this made PDG difficult to monitor.

“It isn’t always used solely for individual initiatives or interventions - sometimes it is used to provide additional TA support within classes to strengthen differentiation and universal provision.” (Participant 3)

“PDG supports so many areas of the school it is hard to track specific spend.” (Participant 42)

Time to monitor impact

Time to monitor the PDG activities was discussed by 5 of the 34 respondents who responded to the open ended questions on challenges or obstacles in monitoring and evaluating PDG spending.

“The challenges are always time, workload and the constant need to get the best value for money.” (Participant 82)

Changes in needs of learners

The changing or increase of needs for the learners or within the school was articulated by 5 of the 34 respondents who responded to the open-ended questions, making it difficult to monitor and evaluate PDG spending.

“The needs of the pupils change constantly.” (Participant 62)

“It is often planned for something and then needs to support staffing as a result of unforeseen expenses (supply cover). (Participant 62)

The second open ended question asked suggestions for improvement: Based on your experience, what improvements could be made to the monitoring and governance of PDG in your setting? Note that the data reported below refers to only responses from those n=31 (33% of 95) participants who completed open ended questions in this section, and percentage scores do not refer to the whole population of survey respondents. The following three themes were identified: funding cycle; core budgets; and less monitoring.

Funding cycle

Of the respondents, 25% (n=8) who responded to the open ended questions suggested that the funding cycle needed to be improved to support more effective monitoring of the grant.

“The PDG should be planned over three or even five years however not knowing your allocation until very late in the financial year makes this nearly impossible.” (Participant 77)

“Monitor more regularly. Difficult because the funding and the academic year don't correspond.” (Participant 94)

Core budgets

A total of 25% respondents (n=8 of 31) who responded to the open-ended questions suggested that PDG is being used for core budgets and this in turn makes monitoring difficult.

“I think the reliance on PDG for supporting other spending within school core budgets in some schools is an issue due to poor overall funding. If the PDG grant could be spent solely as intended it would be much more successful, however, schools are trying their best with real/extreme challenges at present.” (Participant 81)

Less monitoring

A minority of respondents (25%, n=8) who responded to the open ended questions suggested that there needed to be less monitoring, and that the internal monitoring was sufficient.

“Allow schools to monitor and evaluate the grant within their own systems and school improvement processes. Remove the pressure to publish and complete statements/ forms for the purpose of ticking a box and for civil servants.” (Participant 24)

Future needs

Finally, the last section of the survey wanted to gain an insight to the future needs of PDG. The last open-ended question asked the participants to share their insights on the future needs in relation to PDG; n=52 participants responded to this question. Post analysis, seven themes were identified: (i) more funding; (ii) more learner needs; (iii) funding cycle; (iv) UPFSM; (v) maintaining PDG funding; (vi) areas of deprivation; and (vii) guidance.

More funding

Around half (40%, n=21 of 52) of respondents advocated for more funding to support learners needs.

“It needs to be increased to meet the social and economic needs of more families.” (Participant 14)

More learner needs

A total of 25% (n=13 of 52) of the respondents identified that there had been an increase in the needs of learners.

“Increasing poverty and complexity of need.” (Participant 36)

Funding cycle

A few respondents (15%, n=8 of 52) suggested the funding cycle to be changed, so there was a longer term PDG across multiple years.

“A guarantee that the funding will remain and a 3-year projection of funds to allow for longer terms plans.” (Participant 8)

UPFSM

In total, 15% (n=8 of 52) of the respondents suggested that UFSM was a concern for them in relation to PDG allowances.

“With the changes of Universal Free meal provision parents do not understand the changes. Therefore, some families and some pupils may not generate and be entitled to PDG funding. This will mean tighter budgets and pupils will not get the support that they deserve.” (Participant 43)

Maintaining PDG funding

Very few respondents (10%, n=5) suggested that their school would not function without the PDG funding.

“Our school cannot survive without this funding being maintained.” (Participant 4)

Areas of deprivation

A total of 8 % (n=4) respondents suggested there needed to be more recognition for schools in areas of high deprivation and the increasing needs they had.

“At the very least this grant needs to be maintained; without it schools, particularly in deprived areas would not function.” (Participant 25)

Guidance

Lastly, a negligible number of respondents (8 %, n=4) suggested that there was a need for more guidance on the use and effective practice in relation to PDG activities.

“Examples of case studies where PDG has been utilised effectively.”
(Participant 62)

Limitations

There were a number of limitations to this element of the research. First, there was a relatively low response rate considering the survey targeted all educational settings in Wales. Giving the fact that the survey was disseminated at the time educational settings were planning the financial spend and awaiting budgets, the timing of the survey could have contributed to the low response rate across settings¹⁹. Second, the majority of the respondents were located in Southeast Wales. Third, the survey covered many areas of PDG, and while comprehensive, the length of the survey could contribute to low response rates and respondent fatigue. Fourth, response

¹⁹ As a reminder there is no EOTAS other than PRUs represented in any of the data collection methods.

bias, including social desirability and nonresponse biases, can significantly affect survey results. For instance, individuals with strong opinions or specific experiences may be more inclined to participate, potentially skewing the data. This bias can limit the generalisability of the findings, as it may not accurately reflect the broader population's views. Fifth, only descriptive statistics were used to present the results of this survey, a limitation is that no inferential statistics were used to explore relationships in the data. However, inferential statistics may not always be appropriate or necessary in certain scenarios. These include situations with a small sample size, where reliable generalisations cannot be made, or when the analysis aims only to describe data without generalising or testing hypothesis making descriptive statistics sufficient. Non-random samples can violate the assumptions needed for inferential statistics, leading to biased results. Explicitly recognising these limitations is crucial for interpreting the conclusions drawn from the survey, highlighting the need for caution and further research to confirm the findings.

Summary

The survey circulated to all schools in Wales to identify how they spend the PDG produced the following overall findings:

- Schools plan to use and use their PDG to support learner attainment, the social and emotional health and wellbeing of pupils, parental and family engagement and various other forms of intervention/enrichment. This often involves the use of the PDG to appoint support staff and to undertake staff professional learning.
- Schools use various forms of evidence and guidance to inform their use of the PDG, but only approximately half of schools who responded found these sources at least very or moderately useful.
- The majority of schools attempt to use PDG as part of long-term strategic planning but feel restricted by the annual timing period of the grant and uncertainties about its future.
- A significant majority of schools target the use of the grant, as intended, at pupils who are eligible for free school meals, but they also take into account other pupil vulnerabilities in deciding whom they should target.
- Schools use a range of data to track their use of the grant including pupil attainment and the majority base their monitoring of the grant on self-evaluation.
- Pressures on schools resulting from reduced funding and increased pupil needs has led to the PDG being used to support the core school budget.

4.3 Phase 3: Semi-structured interviews findings

Phase 3 semi-structured interviews: The purpose of this phase was to explore complex topics and uncover insights while maintaining consistency with a core set of questions. The conversational nature of these interviews helps build rapport, encouraging candid responses and facilitating the discovery of new, emergent themes. The use of semi-structured interviews was to add depth and context of the survey findings.

The interview schedule was designed in collaboration with the Welsh Government to cover the similar categories in the survey: Targeting, monitoring and governance, strategies, impact, and future needs. A copy of the interview schedule can be found in Appendix C.

Sample description

Table 15 presents the interviewee participants' job roles. 21 participants were interviewed, the majority of them were headteachers (67%, n=14). The results also show that the sample included participants not working in the school sectors, however they were responsible for administering PDG or planning spending activities.

Table 15 Percentage and number of study interviewees by job role (phase 3)

Current role in educational setting	N	%
Headteacher	14	67
Deputy/ Assistant headteacher	2	10
LA grant coordinator	2	10
Advisory teacher Manager for non-maintained sector (EYPDG LA)	1	5
Manager of funded early education team (EYPDG LA)	1	5
Education coordinator for children (PDG-LAC LA)	1	5

Note. Percentages may not sum to 100 due to rounding.

A total of n=16 participants worked for educational settings (headteachers and deputy headteachers); 50% (n=8) were employed in primary schools and 50% (n=8) were employed in secondary schools. Table 16 shows the number of learners in the educational settings represented by this sample of interviewees.

Table 16 Percentage of study interviewees in primary and secondary educational settings according to the number of learners on roll for each setting (phase 3)

Number of learners	Primary educational settings	Secondary educational settings
151-400	88%	13%
401-800	13%	25%
801-1200		50%
1201-1600		13%

Note. Percentages may not sum to 100 due to rounding.

Table 17 shows the percentage of eFSM learners in the educational settings of interviewees. The minority of educational settings represented by the participants had an eFSM percentage between 41-50% (31%, n=5) and between 51-60% (25%, n=4).

Table 17 Percentage and number of eFSM learners according to the sample of study interviewees (phase 3)

Percentage of eFSM	N	%
11-15%	1	6
16-20%	1	6
21-30%	1	6
31-40%	2	13
41-50%	5	31
51-60%	4	25
61-70%	1	6
Over 70%	1	6

Note. Percentages may not sum to 100 due to rounding.

Table 18 presents the location of the educational settings of interviewees by region (i.e., LA). The minority of participants were from Southwest Wales (38%, n=8) and North Wales (33%, n=7). The full breakdown of the location of educational settings and LAs is can be seen in appendix A, Table A.3.

Table 18 Percentage and number of study interviewees according to the location of educational settings (phase 3)

Location of setting	N	%
North Wales	7	33
Mid Wales	3	14
Southwest Wales	8	38
Southeast Wales	3	14

Note. Percentages may not sum to 100 due to rounding.

Thematic Analysis:

This section presents the qualitative findings generated from the semi-structured interviews conducted with individuals that have responsibility in relation to the use or dissemination of PDG, the categories and themes are presented in Table 19. In total, 21 semi-structured interviews were conducted for the current study.

Table 19 Key themes and categories identified in the current study from the thematic analysis of the interviews with individuals who have responsibility in relation to the use of the PDG in Wales (phase 3)

Categories	Targeting and strategies	Monitoring	Effective strategies	Guidance	Impact	Challenges	Future	PDG-LAC
Themes	Conditions for learning	Professional trust	Raising attendance	Range of effective guidance	Difficulty assessing impact	Challenges within the education system (Pressure on budgets, UPFSM Reliance on PDG, high needs schools)	Funding cycle	Centralised approach
	Equity of opportunity	Monitoring in line with spend	Social and emotional wellbeing	Need for more guidance	Value added	Challenges wider than the education system (In work poverty, and the cost of living, Lack of services, in work poverty)	Training	Flexibility
	Engagement and building strategies		Focus on interventions to support academic skills	Sharing resources and developing networks	Pathways		Sharing good practice	Terminology
					Curriculum for Wales			

Category 1: Targeting and strategies

Participants were asked about how they target the PDG and the strategies that they employ. All the participants targeted eFSM learners either directly with interventions or through whole school ways of working. All the participants mentioned that the PDG allowed them to focus on creating a school environment so that learners were able to learn and access the curriculum. Three main themes emerged within this category: Conditions for learning, Equity of opportunity, and Engagement and building strategies.

Theme: Conditions for learning

All the participants agreed that the PDG allowed them to focus on creating a school environment so that learners were ready to learn and access the curriculum. The conditions for learning entailed supporting learners social and emotional wellbeing through dedicated interventions and a whole school ethos.

“You can’t just sit the kid down and work on their reading and writing. You have to bring the families along on that journey because you need to get that buy in because if they don’t, you don’t get the buy in from the parents, then the children won’t see the value in it either. We’re teaching them to read and write. You’ve got to put all that work in at the in the background on other aspects of our work.” (Participant 3)

“I mean our school is actually a safe place for those children to come. It’s a place where they feel that they are regulated and they’re not different to anybody else because they’re, you know, they’re part of this big family that you’re trying to create?” (Participant 4)

Theme: Equity of opportunity

Most of the participants expressed PDG supported learners by removing barriers to learning and enabling the school to targeted learner needs so they have more equal opportunities to be successful in school. This ranged from alternative provision to suit learners needs to access the curriculum, practical support for uniforms (shoes, leavers hoodies and other clothing) and being able to access extracurricular trips.

Some of the school leaders were also using PDG to remove cost-barriers to the school day, ensuring that learners were not disadvantaged further. Making sure that learners could access the curriculum was also seen in the use of alternative provisions (learning hubs, behaviour units) and vocational pathways within and outside of school ensuring learners were able to access provision to support their needs and interests.

“So, we’re very, very conscious here, very aware of not asking parents for money and so, you know, the cost-of-living crisis and everything like that is, you know, even worse now for them. So, we’re very aware of that. Things like, leavers’ hoodies.” (Participant 15)

“Some of our PDG is used to support families...things like residential and the costs of trips and, you know, to ensure that those pupils access all the opportunities in the same way as other children do.” (Participant 10)

“We need a space for our school phobic (learners) to come in and be really calm. Just come in and go get you back in the building.” (Participant 5)

“We also then fund alternative provisions. We do it specifically because they’re the fundamental skills that will enable children to thrive across the curriculum, so the mathematical skills give them the confidence in a range of other subjects and simply for communication skills in English. It allows them to access the curriculum elsewhere, so we very much use specialist teachers to focus their energies on giving children the core skills that enable them to thrive.” (Participant 17)

“He [College tutor] delivers to your 10 year 11 learners and have been learning and respond positively towards him and he’s getting them through two different types of qualifications. Some then do the junior apprenticeship scheme in things like construction, motor mechanics with our local college as well. You know that that has a cost in, but it’s making sure that these pupils remain engaged, and they don’t become NEET. So, you know that the education pathway continues.” (Participant 20)

Theme: Engagement and building relationships

The most discussed strategy was engagement, particularly around family and learner engagement at both primary and secondary levels. This was also important for EYPDG and PDG-LAC learners and building relationships with all the people involved in the learners' lives. Engaging families with the school was seen as an important way to support the learners and this was usually achieved through dedicated family engagement workers funded by the PDG. To engage families, there were parental skill classes and more opportunities for families to come into the school to read or view learners' work. Most of the participants felt that building relationships with parents is key to supporting disadvantaged learners. The participants felt that they understood some of the barriers the parents experienced with engaging with schools and tried to overcome these barriers by being visible and approachable. Family engagement was often aimed at building trust with families and learners and ensuring that the value of education was supported both at school and within the family.

“So, we've employed family engagement workers ourselves, so those family engagement workers are targeted with building relationships with those families in order to try to re-engage them in the educational process because many of the families, you know, don't value education.” (Participant 12)

“So, providing cookery sessions to come into - or songs and stories, session, - whatever their focus has been in their setting that opening the doors up and especially after the pandemic that needed to happen again.” (Participant 7)

“Takes a couple of years to build foundations because our parents have had a bad experience of school themselves...” (Participant 9)

“We're looking at the age of [...] our pupils who are disengaging now on the back of COVID go down to the age of 13. So, what we're having to do is look at ways of trying to engage them. So, for instance, I'm establishing a nail bar to female learners because we've got girls in year nine who are completely disengaged. So, I'm we're also looking to upskill children to be baristas.” (Participant 11)

“There's always working, engaging with parents and of course with the pandemic we took five steps backwards. So, providing cookery sessions to come into or songs and stories, session, whatever their focus has been in their setting that opening the doors up and especially after the pandemic that needed to happen again.” (Participant 7)

Category 2: Monitoring

All participants were asked about the monitoring of the grant. Three main themes emerged within this category: (i) Professional Trust and (ii) Monitoring in line with spend and (iii) self-monitoring in the setting.

Theme: Professional trust

Most of the schools suggested that there was a trusting relationship with the middle tier that the schools were using the funding in the correct way.

“It has been quite nice because it felt like there's a bit more professional trust that we're going to use the money for what it's intended for, you know.” (Participant 1)

“I think it's hugely important to report, but at the moment I think the reporting is correct because I think that [...] schools have to and are given a certain

amount of trust in order to spend the grant, how they see best as well”
(Participant 19)

“A lot of the time they there are certain criteria that we should be keeping to, but there are certain elements of the grant that you just require flexibility. I think there's more trust than there has been in how they use their PDG. I definitely think there is a level of accountability that's required.” (Participant 11)

Theme: Monitoring in line with spend

Most of the Participants felt that there was a need to monitor public money. However, participants felt there was varying depth the spending plans were scrutinized and challenged.

“Personally, I'd like to see more monitoring from within the authority. I think there's a need for Challenge Advisors or School Improvement Advisors to take a greater part in that planning and delivery and evaluating. I don't think it's done in any great depth. There isn't that challenge there. I think there's an awful lot of ‘a headteacher has decided we're going to spend it on this’ and isn't challenged. So, I think that there are certain systems that could be improved.” (Participant 7)

“I think they should be conditional on the things that it is spent on because [...] I don't think it's appropriate for a school to receive £100,000 and then not deliver on the children for whom it's expected for.” (Participant 17)

“But because I see all the grants, we've got our whole school approach plan; we got community focused schools plan, we got PDG plan, we've got you know there's a foundation learning plan- there's a lot of plans. ALN implementation plans, I suppose I know what the purpose is, but I would still ask what's the purpose. Yeah, it's planning for planning's sake.” (Participant 19)

“...but it is just another and task that has head teachers or managers that that it's just a waste of time for us [...] And to be honest with you, I think it's just the paper exercise.” (Participant 11)

Theme: Self-monitoring within settings

All participants were asked how they track and monitor the activities of interventions or strategies that they use within their setting. This also included the internal monitoring from the governors. One theme emerged within this category: Identifying and changing practice.

Theme: Identifying and changing practice

Most of the participants felt the tracking allowed them to demonstrate the effectiveness of the interventions or strategies. Self-monitoring also allowed them to demonstrate where interventions were not working.

“So, from the initial assessment, as we're going through, if we see, you know, an intervention isn't working during that time, then we will tweak it and change it as we go along.” (Participant 6)

“We do it through data and tracking and the use of the grant then means that when we allocate students to individual teachers for mentoring, for example, that then feeds itself into performance management, so that those individuals know that the success of their year has been based on the fact that we're working with children who are disadvantaged.” (Participant 17)

“So, we break down what each part of the grant is being used to mitigate for and then we give clear success criteria of what that would look like if it's working, and we measure and we monitor to that success criteria. So, if you looked at my grant tracker, it's very much just a green, amber or red, but that's where I'm planning whether what we're doing is working out there is data and process behind that, which allows me to make that decision. Which makes really good self-evaluation.” (Participant 8)

Category: Effective strategies

All participants were asked about effective strategies. Three main themes emerged from this category: Attendance, social and emotional wellbeing support, and a focus on interventions to support academic skills.

Theme: Raising attendance

Strategies to improve attendance included a range of strategies, including a walking bus, attendance tokens, using family engagement offices to develop relationships with families to improve communication and relationships. Most of the participants felt that post COVID attendance had been an additional issue across the education system. The majority of participants suggested that improving attendance was effective to support all learners including learners from low-income households.

“We have family liaison as well, so he does attendance tracking. It is so we are starting to see in improve it, but it took a while to get to that point. It's, you know, it's really quite dire and some of the issues are horrendous, you know, like below 50%. Yeah, attendance is one of the top ones.” (Participant 4)

“But since I've been here, we haven't had to do any fixed penalty notices at all, because that approach has worked, and we've got the attendance back up.” (Participant 1)

Theme: Social and emotional wellbeing

Most of the participants felt that supporting learners' social and emotional needs was effective. Given that most of the participants targeted social and emotional needs it is not surprising this was felt to be an effective strategy. This was done in various ways, as creating the right school environment was suggested as a core way to target PDG funds. Dedicated interventions like ELSA, wellbeing, and pastoral care teams within the school, as well as some outside interventions, were utilised. Additionally, being trauma-informed was considered important.

“So what we've done is put like a soft landing club where we know we've got a boat seven or eight children to find it difficult to come in and defrost almost a little bit in the morning.” (Participant 3)

“So to make sure they have the right mental, physical and academic health to go to the next stages.” (Participant 8)

“..unless we address wellbeing first, they're not going to be able to attain in academic tasks because you know they have - flashbacks and something that's happened, their mind is drifting off to a place where they don't feel maybe particularly happy, you know, so it's the Staff here – it is a very nurturing School.” (Participant 10)

“If, if for example my wellbeing provision shut tomorrow, I would have 3035 children who could not come to secondary school.” (Participant 8)

Theme: Focus on interventions to support academic skills

Focused academic interventions were felt to be effective strategies to support learners. These interventions mainly targeted learners who needed additional support with academic skills, including mathematics, literacy, and other necessary skills. This support was often delivered in smaller group settings with dedicated teaching assistants/ support assistants, indicating schools were using tiered responses to learner needs.

Well, over the last few years the PDG has been really, really important to us in supporting our learners who are in receipt of free school meals both in their curriculum opportunity and extracurricular enrichment as well. So, we have used PDG to provide more tuition in the basic skills, sorry, the key skill well both actually the basic skills of literacy, numeracy. And the key skills of literacy, numeracy, English and maths, academic support as a pupils get moved throughout the key stages towards their examination outcomes at key

stage four. So, it can take the form of early intervention in the first few years of secondary school to additional support for GCSE English and maths. (Participant 19)

We've got a number of high level teaching assistants as well, and they do intervention work again based on literacy, based on numeracy, based on PSE²⁰ and kind of social skills to make sure that obviously the children in the [Redacted], whilst they're not necessarily following qualifications but they're also making progress relative to their individual starting point and they're starting point is measured on, their individual development plans on whatever bespoke plans that they have. (Participant 17)

Category: Guidance

The participants in this sample articulated they used a range of guidance to support PDG spending including Welsh Government guidance, Estyn thematic reports, EEF, data from England, as well as academic research. Four themes emerged within this category: range of effective guidance, need for more guidance, sharing resources and joint working, and developing networks.

Theme: Range of effective guidance

Some participants discussed that the guidance available to them supported the planning and targeting of the PDG. This also included working with the regional consortia and guidance from local authorities.

“We work closely with our improvement partner. We do read the guidance from Welsh Government on the Pupil Development Grant, and you know the ways in which it can be used. I would say in terms of the effective practice, that's slightly different because what we use a lot of Estyn best practice case studies.” (Participant 19)

Theme: Need for more guidance

Some of the participants suggested there was a lack of guidance that was focused on PDG and how to implement the activities, that it was not user friendly and difficult to use in certain contexts.

“But generally, I've not seen a piece of research that has come out of Welsh education that has been useful for us.” (Participant 17)

“I know there is information out there, but it's not always in the most user-friendly vocabulary and I know there's suggested ways of using it. But

²⁰ PSE refers to Personal and Social Education

perhaps sometimes it needs to be a clear if this is what you definitely can't use it for.” (Participant 2)

“Like, with regards to the thematic reports we get from Estyn and as a school that faces really difficult challenges and working in areas of deprivation, I find it difficult to find those thematic reports to support us. What they tend to do is focus on the really good schools, the high performing schools.” (Participant 11)

Theme: Sharing resources and developing networks

Some of the participants suggested they are working on shared projects and wanted the opportunity to work in clusters with regards to PDG resources; this included working more closely as schools. Some of the participants had developed networks with other schools that are supporting similar demographics and working with peers. Some of the participants suggested setting up a network of high eFSM schools to share practice, challenge the government and work on shared projects.

And it's sharing resources as well, you know, like I've been really lucky that alright in [Name of local authority] there's three schools I work closely with, we've both got big budget, but we can engage in projects together and keep those costs down. (Participant 9)

“We're in the process of advertising for our own family engagement worker to work within the cluster.” (Participant 12)

“We just need to get everybody on board with it and particularly get our settings and schools working closer together. If that's cluster working, or however that works, sharing good practice, all of those things.” (Participant 7)

“We've started to meet once every half term because again, we've got more in common. They've [other schools in the area] got their own issues, you know, and good luck to them, but they're so different from ours, the things they're trying to wrestle with are very different from the ones that we're trying to wrestle with, and it's actually talking to your peers.” (Participant 5)

“There's just not enough emphasis placed on how important peer and work is.... They just know there's not enough and it's so key, particularly if you, you know, if we're really, really passionate about closing this poverty gap.” (Participant 9)

Category 3: Impact

All participants were asked about the impact of PDG, the measurement of impacts and the challenges they may face. Four themes emerged from this category:

Difficulty of assessing impact, Value added in the individual learner's journey, Pathways, and Curriculum for Wales.

Theme: Difficulty in assessing impact

The impact of PDG spending was perceived by most participants as challenging to assess using national test data. Many discussed that, in practice, the attainment gap has remained unchanged since the introduction of PDG, and that measuring its impact has been difficult. All participants acknowledged that there are other methods to evaluate impact, such as data on attendance, destinations, and exclusions. They also suggested that qualitative data, such as parental engagement and learner feedback, could be used to measure impact.

"I think that's what we've got to be looking at and thinking, you know, it is about closing this attainment gap isn't and it's not, it's not closing, is it, you know, let's be honest." (Participant 1)

"Variety of ways to measure impact - our own in-house surveys around, you know, pupil voice. We have a lot of soft data within the school setting. We also have a range of harder data, you know, quantitative data around rates of attendance, rates of exclusion, examination patterns, examination success or otherwise. So, I would say that for me it's that mix... Nuance between achievement and attainment, you know we look very much at adding value for our pupils and we're very proud of that journey. I think it's quite reductive just to look at quantifiable data. You know it has to be a range of data, including that kind of qualitative data, that trust in school leaders." (Participant 19)

"The audience that we have in front of us, you know, the pupils that we have in front of us and allows us to really develop, you know, that sort of softer skills which are hard to measure, you know communication and cooperation, teamwork, resilient, you know... They may be very practical and will go into, through an apprenticeship or into a trade, but they may not have had those high grades. It doesn't mean that they're unsuccessful." (Participant 10)

Theme: Value added in the individual learner's journey

The participants in the sample felt that the PDG needs to be measured on the individual learner's journey throughout their time in education. It was felt by many participants that, particularly for early years, these learners were not ready for school and the skills development that schools were having to address with learners was much more complex. This was also echoed around the needs of care experienced learners from the participants with responsibility over CLA learners. Most participants felt that measuring the impact on standardised scales did not adequately capture the value the PDG adds to the progress or outcomes of learners from lower-income households.

“The children come in to us [Interviewer name], you know, use nappies, use bottles, are in pushchairs are only given these devices they can't sit, they can't listen, they can't focus.” (Participant 15)

“Yeah, because that's about the value added. And isn't that all about the new curriculum as well? It's about individual progress, isn't it? What does progress look like for this child and progress for you is going to be very different for progress from me. So, it's about your progress journey, my progress journey. So not everyone can show the impact.” (Participant 13)

“You can't just bridge that gap by putting in skills intervention programs or additional teachers for support groups, etcetera. It's so much more, so much more holistic work that goes into it as well. You know that's the real impact of PDG for me. And I think PDG needs more recognition because I don't think we will ever close the gap in terms of GCSEs, as much as we would like to, on less challenged schools because what we're seeing here is far greater issues than the primary schools, as you said earlier, kids don't brush their teeth and not toilet trained with you know basic skills.” (Participant 6)

“That is what I was trying to explain to Estyn, you know, because the Estyn message, since sort of COVID onwards, really, and the way sort of the middle tier message was very much - as long as your pupils make progress in your school from where they began in their story to where they end and year six, that's great. OK, now, but that wasn't the agenda at all that I had during that inspection. They weren't accepting because, I was saying, but this child I said, this child wasn't coming in at all. Now they're coming in, which is why they're obviously a bit behind. But for them, they've made progress, know they're trying. And I could show that these children were making progress, however limited that may be. They work at their level of ability, and they succeed and achieve, you know their best, that's best for them. And they make progress. They leave our school, you know, having had a positive primary school experience, having had a lot of nurture having had, you know, work on their self-belief, on their self-confidence on their mental wellbeing, you know and hopefully in a better place mentally and emotionally to carry on their learning journey in high school, you know. And you know, we are never going, and that's why I hate that phrase, closing the gap, because we are never in our six years with them here, we're not going to do that because they start... such a low place.” (Participant 15)

Theme: Pathways

Among all the secondary schools' participants in the sample there was a consensus that standardised testing was needed but there also needed to be other pathways

post-16. This included more vocational pathways that are suited to what learners want, giving learners more options after GCSEs and making sure that learners would continue or enhance their opportunities to develop lifelong skills, and measuring this (pathways post-16) was an important element to the outcomes.

“This is a national issue, but we need more vocational pathways for young people, year 10 and the year 11 because not everybody is suited to the GCSE route, we know that and given the difficulties that our children looked after, have been through generally, they tend to be, or some of them not all, but they tend to be the children that need the vocational style.” (Participant 13)

“That's when it comes back to is what is the aim of PDG? to have more children employed [...] more of our young people in employment when they leave school.” (Participant 3)

“I've always thought it's a fair measure because ultimately the success of a secondary school, it isn't just about examination results, but we are in the business of giving children life chances, and qualifications are the currency that opens doors for children beyond school, and therefore I think it is a measurement whether or not you would then compare that to single accountability measures is one thing. I don't think that's probably sensible, but ultimately, it is about how well children have achieved and does that achievement enable them to progress to the next stage of their lives, whether that's college apprenticeships, work-based environments or whatnot.” (Participant 17)

Theme: Curriculum for Wales

There was a suggestion from some of the participants that CfW had been good as it focusses on individual progression, and this can help to understand learners needs more effectively and allows the individual progression to be measured.

“With the new curriculum and assessment, it is about this is where my child or their children are starting from, and they'll all have the different starting points.” (Participant 16)

However, there was a concern from a quarter of the participants around the longer-term impacts less structured data sets could have on the education system in terms of measuring progression and equitable provision of the curriculum.

“I think the new curriculum, the ambiguity around assessment in the new curriculum, has the unintended consequence that schools may have less data rich, if that makes sense.” (Participant 17)

“That message to other schools, and that's what worries me, is I think we're moving closer to a postcode lottery when it comes to education again, which is why the original curriculum was introduced - so that every child had the same experience across the country. Now, because you get in these pockets of right, this school's interpreted the new curriculum this way, and you know, they get a little bit more funding because they've got PDG and like parents are moving to our school because of the opportunities and the experiences that pupils get because they're not getting them and that school and... it bugs me that Wales is a small country, yet we still got this 22-23 wherever it is different local authorities who then got their own agenda and stuff.” (Participant 9)

“Before we could have this agreed little language where we could talk about, yes, those children. Now, since they've started in year three to the end of year six, they have made 2.3, well 1.3, levels progress, which is above the normal expected for the child of that age. There isn't going to be that cold hard data for lots of things out there, and I think that's got to be looked at and there's going to be more value of qualitative rather than quantitative...” (Participant 3)

Category 4: Challenges to implementing PDG

Participants were asked about the challenges of implementing strategies. Two themes emerged from this category: (i) the challenges *within* the education system, with 3 sub themes (Pressure on budgets, UPFSM, PDG reliance and high needs schools) and (ii) the challenges *wider than* the education system (In-work poverty, the cost-of-living crisis and lack of services).

Theme: Challenges within the education system

All participants suggested the education system in Wales has seen a significant amount of change in the last five years. Including changes in policies and increasing pressures on the school's budget. Participants discussed how PDG was essential to the school functioning and without PDG some participants felt they would not be able to support learners. For the participants who represented high intakes of eFSM learners there was a feeling that the PDG funding was not sufficient to cover the needs of the learners.

Sub-theme: Pressure on budgets

All the schools discussed the wider funding landscape of the education system, the reductions in budgets were a real concern. The participants discussed having to make difficult decisions around what provision to continue. Most of the schools were having to think about cutting staff and are facing deficits within their budgets. The PDG was also being used to support core budgets.

“Estyn pulled out a case study for our interventions and how we do that in school, but if they were to come back again this year, they wouldn't see the same as what they saw in our Estyn year because we've had to cut so many staff that we're running interventions.” (Participant 4)

“The funding levels have remained static, but the rate of which it's gone up has not matched the cost of staffing ...for example.” (Participant 19)

“What we are finding is that is increasing pressure on budget from ALN, and just general rises in budgets which aren't being fully funded out there. Alright, you know, schools and education are not mutually exclusive, and we could be very careful about what schools are expected to pick up on. And you know the classic example I use is the teeth cleaning. Is my dentist going to sit there and teach your kid to read?” (Participant 3)

“So, for instance, [Redacted] now we got 5 secondary schools, and four secondary schools are avoiding redundancies because they're using their surplus, right?” (Participant 11)

“I would say, as I probably alluded to at the start, without PDG there would be huge redundancies in schools and you know I've said it, I've heard it said many a time the PDG is propping up more school budgets in some shape or form, right.” (Participant 12)

Sub-theme: UPFSM

There was a concern from all interviewees in primary schools and some in secondary schools that the roll out of UPFSM was going to have a detrimental impact on how low-income households are measured. There were concerns that schools will miss out on vital funding to support learners and that while the policy has noble intentions, the utility of the policy was questioned.

“And what measure are you going to use to drive the funding in the PDG? [...] for us if it was driven on a deprivation level, which is kind of how it should be, obviously we would probably still be OK, but that I think is a problem moving forwards in primary schools, because we don't know, and they don't seem to have an answer of how they're going to do it.” (Participant 1)

“So, that uncertainty in identifying the ones that actually need that input, and need that support, is probably a little bit harder now because people are not doing the applications for FSM. Yeah, I, and, you know, like we pump, we send the leaflets out, you know, and it's really important [...] to get the support that's available there”. (Participant 4)

“One way in which they could find the money for that, is to review the decision around universal free school meals for primary schools, because that's £100

million policy initiative, I recognize the capital P politics that have come with that through the collaboration agreement with another political party. People who can't afford it shouldn't have to pay for it, and I'm unconvinced by the arguments that every child should go in and just have a free school meal? because by the time they get to secondary school, they have to pay for it themselves.” (Participant 5)

“It feels like a vanity project and something that isn't putting at the heart the needs of children, making sure they're well fed because, in most families where they can afford it, they feed their child.” (Participant 17)

Sub-theme: Reliance on PDG

All the participants suggested that PDG was necessary for learners from low-income households, and that without this grant learners would not make as much progress. Some of the participants discussed that without this grant they would not be able to function as a school, they could not address the needs of the learners and the outcomes would be more exclusions and this would have a greater cost implication for local authorities and wider services.

“If PDG is taken away there, you may as well put the ‘for sale’ sign up on one of those sites.” (Participant 3)

“We've always been passionate for our kids, but we are terrified... In reality, PDG stops our children being permanently excluded. It stops our children leaving without qualifications and the pathway.” (Participant 8)

“But the one thing we said was, [...] please, please, please don't amalgamate everything and lose the PDG because for schools like mine it's absolutely essential. You know, if I lost that PDG money, my school would be chaos. It would be chaotic because all the stuff we put in, like I say with the behaviour with the nurture, all of that [...] with all the interventions, you know, most of our children don't get anyone to read with them at home [...] I'm paying people to sit and read with the children. I know standards would drop, and exclusions all rise.” (Participant 1)

“EYPDG, our forecasted EYPDG for this year is less than half of what we had last year. Like I said, this year [Interviewer name] even though we know we've got more families living in deprivation than we've ever had before and more childhood poverty, our EYPDG has actually been reduced significantly. So again, it's looking at the benefits of how we can best use that, and we felt this year to keep the TA would be more valuable, because we know if she's central to us, then we can go out and support all of the settings rather than actually thinking like, let's put this in.” (Participant 16)

Sub-theme: High needs schools

Some participants in the sample had a very high percentage of eFSM learners above the national average. All the schools in the high eFSM category discussed the pressures they face. Because of the learners they educate, there is a high proportion of complex needs as well as the wider deprivation in the community some participants felt there needed to be a further funding stream to support the learners in high areas of deprivation.

“They might need some additional support, you know, coming back in September because our children hate the school holidays. I mean, they hate it. Again, I would say over 65 more even percent when they come back, we’ve got to start from scratch with rules, regulation.” (Participant 15)

“...the current PDG system doesn't work for schools like ours, I mean it buys into the problem about the whole system of how the funding comes in and the fact that it doesn't work. So again, that's a chunk of salary that is covered by them, which fits into the much bigger demand the children like ours have compared to. And I think this is the thing that falls between the gap, is the fact that, you know, I've got 700 free school meal kids, I've 60% even more of my kids are probably, we've got four or more ACEs. Though every one of those children can take up a member of staff if not two. The money, the PDG money, I mean, it's a bit disingenuous, and this is where there is this problem with the way the funding is worked out because if I was [in a lower eFSM school] I don't have those issues and I don't have them in the multiples that we do...sort of some separate category for schools of whether that's extra money or different ways of classifying this success in the school or evaluating the schools or both, umm, the more we can do, the better you know, I know it's a local authority decision.” (Participant 6)

“We've created a whole high FSM group across [Redacted] which is made up of every school with over 30% free school meals and we challenge each other, but we also we also challenge government, we challenge region and to appreciate and acknowledge that our job is different.” (Participant 8)

“When we analysed last year's GCSE results, we had about, I think it was as many as thirty students who didn't get anything. And when you take into each one of those cases, you know, if you look at the, so when you know when we went through those thirty kids that didn't grade last year, every one of them is incredibly complicated. Every one of them, you know, whether it was CAHAMS²¹, whether it was multiple ACEs, multiple safeguarding issues, young carers or whatever, and actually you can have a team around the child for every one of those children... you know any of those schools in the bottom

²¹ Child and Metal Health Service

and I use the word precisely, the bottom family of schools, we need that money as a block as part of our school's budget core funding because it's not going to go away.” (Participant 5)

Theme: Challenges outside of the education system

Challenges outside of the education system was a theme that was developed based on the responses of the participants. This was then separated into sub themes: In work poverty and the cost of living and the lack of services.

Sub-theme: In-work poverty and the cost of living

In work poverty was discussed by most participants. It was also recognised by the participants who had responsibility for the grant at local authority level. There was an observed increase in families living in poverty - even though they are in employment, they were not able to support their children financially or had a 'poverty of time' to engage with their children's education. All participants discussed that cost-of-living pressures had impacted learners' families, but that the increase had also meant schools were facing higher costs.

“My biggest concern is, you know, the working poor. And, so, those children are missed. And then in a lot of schools like mine, in areas like mine, a huge proportion of their group, it is in that working poor, and it's having the ability to provide equity of education for all of them. Minimum wage or 0-time contract for the people using our food bank now are the people who are on minimum wage or 0-hour contract. And you know that we have people who work full time, two parents full time and they cannot feed their children. They're angry and they're disillusioned with society. You know they can't engage with their child's school because they're literally on their knees.” (Participant 7)

“So, in terms of parents, perhaps not spending as much time at home with their children, supporting them with their homework or the additional sort of needs that they may have, I think that I can't give you a figure, but I would say yes, there are children missing out because of because of that fact. And also, let's be honest, we got the cost-of-living crisis on the go, you know, prices are increasing incredibly, at an incredibly fast rate, and people need to work to provide.” (Participant 14)

Sub-theme: Lack of services

Some of the schools were facing increasing needs that would have traditionally been supported by services within the community. This included specialist services around mental health, speech and language and community services.

“When CAMHS cut back, so if you can imagine now [...] if you had suicidal ideology and a plan for suicide, you're 28 days before it comes appointment. Every local service has cut back, and the needs have got greater and now education will cut back, and I don't know who will fill those gaps and that's terrifying. And because we, because the children are everything.” (Participant 7)

“Yeah, because we've got children now. Who are on the waiting list for speech and language or for preschool development. In fairness, they do get their initial assessment within 12 weeks. Which 12 weeks for a 3-year-old is a long time. But you know, it's not as bad as some other areas, but then once they've had that assessment, it quite often they're told they got a two-year waiting list. They're put on a waiting list, but those children's needs are not getting addressed by the right professionals until they turn 5. So, they've had that two years with, you know, everyone doing the best they can for the child, but without that professional support that's needed.” (Participant 16)

“And of course, that's there's the double whammy of children's social services not being able to cope either because of their recruitment crisis, etcetera, and they are underfunding....” (Participant 5)

Category 6: Future of PDG

All participants were asked about the future of PDG. Three themes emerged in this category: The funding cycle, training and sharing good practice.

Theme: Funding cycle

Almost all the participants in the sample advocated for a longer funding cycle for all elements of the grant²² (PDG, EYPDG, PDG-LAC). This not only matched the three-year school planning documents but would allow schools to demonstrate impact over a longer time scale. Schools discussed the reactivity of spending because the allocations come late in the academic year, and that the interventions did not have time to embed. The short funding cycle was also detrimental to the staff employed by PDG funding, this included a difficulty in recruiting good quality staff on short term contracts, and the challenge of time and resources in having to readvertise posts. Some schools also discussed the need for the funding to be allocated in the academic year rather than the financial year.

“If we just knew what we were having over those three years, that would help us to plan better, which would maybe lead to us not wasting as much money...but we'd be able to have more time to review properly what we think

²² There was no EOTAS PDG representation in the sample.

we need rather than putting money into something that we may have to do just because, well, actually you've only got 7 months to spend this now because you waited till September to make any systemic changes. So, you know when you can spend a lot, then training people up and then, you know, in a year and a half later, it's a case over your contract up now we kind of hold renew it.” (Participant 3)

“What the future PDG needs to be sustainable, doesn't it? [...] it's not an element that's going to be cut. It's very difficult to plan because it doesn't go with the academic year, it goes with the financial year [...] we're having to have those slight conversations with staff really last minute, which is not fair on them either. When they've gotten certainty, you know, in the schools, in a position where unfortunately can't hire permanent staff [...] that's not good security for staff. It's not good for their wellbeing because they don't actually have job security [...] We've just done another recruitment now but we've had to recruit them until March next year [...] We need staff in the building to obviously make sure that every class is covered. You know, we're losing that member of staff because she wants better job security where it's not year in, year out and but now in the summer term, she's going to have to train up a new person. So, it's actually costing us two members of staff [...] for that training again.” (Participant 4)

“I don't know any other organisation that is basically a multi-million-pound business. Any other organisation planning their budget with like 4 weeks to go until the start of the budget and not have the security for 3-4-5 years. PDG is an example of it because actually you know these kids are coming in you know you, know you can pretty much assume they're going to do year 7 to year 11 so there should be some sort of block there should be some way of going right there's five years' worth of funding.” (Participant 5)

“For a lot of settings now and for us as an authority, it's knowing in advance this money is going to be guaranteed for three years and at what level because then that strategic planning would just be so much more effective.” (Participant 7)

“As school leaders, we're expected to create three-year plans. I haven't got my budget from April 24 yet, I can't plan for what I can do the rest of this academic year, let alone where it can go next. I also think with that getting it over a four-year plan, the big thing that hit me is the disproportional impact of the pandemic on children living in poverty. Everyone accepts it was disproportional, but PDG was already there to intervene before they had a disproportional impact.” (Participant 8)

“I've gone through three attendance officers, maybe four because the grant funding came to an end, and we had to finish the post and then we have to wait for the next grant because we weren't sure if the next grant was going to come or not.” (Participant 11)

Theme: Training

Some of the participants discussed the need for more training around what effective practice is and the barriers that families from low-income households face and this will need to be at all levels of the education system.

“They will be predominantly staffed by middle class people, and they have no idea of the reality of context and that's why I know I'm saying it again, but that's why we have to make sure on every panel the full context of schools is because otherwise we're going to plan the wrong things for the wrong children [...] If like, Welsh Government are putting panels together, or the regions are putting panels together, they always make sure they have a linguistic mix and phase [Primary and secondary] mix. No one has a mix of context.” (Participant 8)

“...lack of advice, more than poverty. Yeah, I think, clarity and transparency about the effective strategies that worked, I think the lack of, the lack of visible and disseminated research that has been done with all the middle tier, whether that's local authorities, regional consortia at the National Academy, I'm not aware of a single piece that has come out that has shown a school has implemented these things...” (Participant 19)

But I think that's a mistake and I think also one of the barriers is that to the people, to the civil servants in government, do they have the experience track record and understanding of how to do this in a school based setting, is that knowledge there or do they rely too much on the middle tier and the local authorities and the regional consortia to give them advice on it? And maybe that's where the lack of expertise is coming out, because I don't know whether there is an expertise that is there that communicates that to influence.” (Participant 17)

“A lot of my teachers are middle class. They were lucky enough to go to university. They are, and they hadn't experienced what our families have experienced. Yeah, they were blown away that, you know, our families are having this level of stress, even before they get their kids into school in the morning. So no they're definitely not enough training.” (Participant 9)

“The quality of young teachers coming into the profession, on the whole, are extremely ill prepared and I don't think the training is good enough at the moment [...]” (Participant 11)

Theme: Sharing good practice

A small number of participants felt that there was not enough of sharing good practice in relation to PDG spending and strategies used.

“And we do share good practice and we share sort of like interventions that are working and things like that, but not necessarily in as much detail as I think it could be if you were all in the same sort of place. I think just that seeing the good practice because you know we get stuck in our ways sometimes.” (Participant 2)

PDG-LAC

In addition to the main categories listed in table 18, three participants were also responsible for PDG-LAC. The following themes were derived from the data in relation to PDG-LAC, these were: Centrally retained staff, flexibility and terminology.

Theme: Centrally retained staff

All three participants felt an effective strategy for PDG-LAC was to have centrally funded staff by the PDG-LAC in the local authority. The retained staff could support all learners that came under the care-experienced learner category. Furthermore, the centrally retained staff could go to educational settings to ensure that all learners had Pupil Education Plans (PEPs), provide support for learners in line with the PEP, and offer specialist training and support to the educational settings. Some LAs have a cluster model of funding - participants were concerned that some learners were missing out on support and there was a difficulty in monitoring impact.

“Those specialist teachers do a range of work. They do PEPs with the schools, they do training for designated teachers. They go into schools to actually support the children on a one-to-one basis and, because we’ve got lots of sort of pockets of CLA children. We’ve got a couple of secondary schools that have 10 to 12 CLA children. They will go in for a day every half term, they’ll see those children, talk to them, do their PEPs... it’s working really, really well and there’s lots of positives. It’s every single child gets that benefit. So, we’ve got since the virtual school’s head been in post, we’ve got 100% PEP completion and they’ve been to the specialist teachers have been to every single PEP. So, they know these children inside out and they will attend CLA reviews if it’s a complex case, we’ve had an improvement in attendance.” (Participant 17)

“I try to encourage a collaborative approach and clusters are all very, very different... You know, some work really effectively as a group and as a cluster. Others, they’re not so well established as a cluster” (Participant 13)

“And there I am asking them to get together, spend the time to get together, decide what you're going to do with it, and let me know. And it's in terms of value for money. Are we getting better value with it going into clusters than we did [before]? We could clearly focus on those that were looked after and care experienced, and we had a speciality in that team...” (Participant 13)

Theme: Flexibility

The participants who had responsibility for CLA felt that CLA learners had complex needs and their frequent moves between educational settings and counties. Participants discussed the need for flexibility, so that learners are supported as they transition to a new educational setting or area, allowing some funding to follow them.

“The grant is quite flexible in that it’s there to support children looked after, so it would depend on how you internally have put local arrangements on how you're splitting that grant... For us, we understand there's a need to fund the virtual school, but we also know that there are out-of-county learners that need a contribution. So, we fully understand that and accommodate for both.” (Participant 17)

“We did passport the funding to schools, but we would top slice effectively to keep a pot for those out-of-county children and then share out the remainder to the schools. Now, if at the end of the year there have been less out-of-county placements or they'd reduced, we would share that little bit of slippage over to the schools.” (Participant 17)

“If a child joined us part way through the year from elsewhere, we could put some focus in straight away. If a school was struggling because something happened in a child's life and their behaviour had changed as a result, we could put some support in straight away. But we were clear about that, that support; it was always more or less a six-week focused piece of work with a school.” (Participant 13)

Theme: Terminology

Participants suggest that there should be clear and consistent terminology for CLA learners in order to avoid confusion about who and what is meant in relation to PDG spending. The participants felt that as PDG-LAC infers the legal definitions as children currently in local authority care and but care experienced learners have been in the care system but are no longer CLA, this can create confusion.

“We can't get rid of 'LAC' because it's regulation and because there are still LAC reviews...However, children prefer to be referred to as care experienced, and I agree with it, cause their children first and foremost, they just happen to be looked after. It doesn't fit and it leads to confusion. Schools in particular, why is it called LAC regulation, if we're expected to cater for all the children who are a care experienced?” (Participant 13)

“But I am aware that you know some local authorities still use LAC, so they mean one and the same. It gets used interchangeably depending on if you are in national meeting.” (Participant 17)

Limitations

As with all research there were some limitations to our research. First, interviews were conducted with many high eFSM educational settings; the average eFSM percentage of this sample was 45.5% which is significantly higher than the national average, which could bias the results. In addition, a total of 5 interview participants also filled in the survey so there may have been some double counting, although this was a minority of the sample. Second, the semi-structured interviews were designed to provide deeper insights into the research questions and survey. Although the approach used is not generalisable to other populations, it supports a more nuanced understanding of the research aims. Finally, while there were some findings related to PDG-LAC this was only discussed by a small proportion of participants; therefore, caution should be used in interpreting these findings to wider PDG-LAC.

Summary

The semi-structured interviews with a sample of school/educational leaders indicate that they:

- Use the PDG to focus on the social and emotional needs of learners (including school attendance), their attainment and the engagement of their parents/families.
- Would welcome more guidance on the use of the PDG, high-quality professional learning in this area and the opportunity to collaborate with other schools and networks of practitioners.
- Believe it is difficult to easily assess the impact of the PDG at pupil level and have concerns that the nature of the Curriculum for Wales will increase this challenge.
- Believe that the impact of the PDG should be seen as the value added to the learning journey of pupils and that in this respect providing more vocational pathways would be of benefit.

- Accept the need for monitoring of the grant but believe this should be based on trust and be as 'light touch' as possible.
- Wish to see longer-term allocation of the PDG and its timing being allocated to align with the school year.
- Are concerned about the increased demands being placed upon schools, particularly those with high levels of pupil and family need stemming from poverty, at a time of budget cuts for schools and other public services.

5. Discussion and Conclusions

There were four key research aims:

1. To identify what information is currently available on the use of PDG in educational settings.
2. To understand the monitoring, governance and guidance structures that are available to PDG decision makers in educational settings.
3. To identify how the grant is targeted, and impact is measured.
4. To understand effective strategies within the system and barriers to effective impact of PDG.

1. To identify what information is currently available on the use of PDG spending in educational settings.

The documentary analysis revealed that that only just over half of the sample of mainstream schools publish PDG statement online. This is disappointing given that this is a requirement of the terms and conditions of the PDG.

It also impacts on the role of PDG advisors who have responsibility for monitoring the published statements in line with the guidance published by Welsh Government, [Guide to the Pupil Development Grant](#) (Welsh Government, 2023c). Even though schools are guided to publish the statements in line with [Pupil Development Grant \(PDG\) school statement template](#), our data found variation in the statement templates in use and the detail provided within these also varied.

In settings that have used the recommended PDG statement and detailed the suggested tiered approach, the majority of the PDG funding was targeted at learning and teaching, which is within the terms and conditions of the grant (Welsh Government, 2024b).

From the sample of PDG statements, settings were generally not reviewing the outcomes from the previous year. This could be for a range of reasons including many schools not using the suggested template and a lack of awareness on standardised reporting expectations.

The findings from the documentary analysis suggests that educational settings are intending to use PDG funding in a range of ways to support learners from low-income households. The main areas of spending included those focused on supporting pupil social and emotional wellbeing and learning and teaching interventions designed to raise attainment. There is also a strong focus on building relationships through parental and family engagement. These findings suggest that educational settings are spending PDG funds within the terms and conditions of the grant.

It is evident that many schools - either because this is their chosen strategic approach to raising attainment and/or because of increasing pressures on core budgets - use the PDG alongside their core budgets, rather than to fund a separate strategy. This can result, for example, in some cases of PDG being used to support other groups of learners and maintain statutory provision in, which are not necessarily within the remit of the grant. This also inhibits attempts to monitor the impact of the PDG as a discrete grant and in general is a cause for concern.

2. To understand the monitoring, governance and guidance structures that are available to PDG decision makers in educational settings.

Whilst schools recognise that their use of the PDG should be monitored, generally they believe that current processes were sufficient and that if any changes are to be made these should be 'light touch' in their nature.

The survey identified that a range of approaches were currently used to monitor the PDG. Mainly this was undertaken by leadership within the school including governing bodies or by consortia/local authority staff.

Participants considered internal monitoring and governance to be largely effective and focused on support for learners. The interview data indicated that internal monitoring is used to adjust provision according to learners' needs, in line with PDG guidance. Furthermore, interviews revealed that external partners trusted schools to make decisions on the specific needs of learners.

Challenges that were faced in monitoring and evaluation included the wide variety of interventions being used and the limited time available to track activities and needs of learners.

Results indicate that settings were drawing on a wide range of guidance to support their decisions on using the PDG. Generally, schools would welcome additional guidance, improved professional learning, opportunities to collaborate with other schools and membership of practitioner networks.

3. To identify how the grant is targeted, and impact is measured

The survey results show that a large majority of the participants were using eFSM status to target learners. They also use data to identify other vulnerable learners and include them in interventions funded by the PDG. Learners with social and emotional needs, from low-income backgrounds and care experienced learners, were cited as being examples.

Whole school, small group and one-to-one interventions are funded by PDG. Whole school initiatives were often focused on social and emotional wellbeing in line with the Welsh Government's [Framework on embedding a whole-school approach to](#)

[emotional and mental well-being](#) (Welsh Government, 2021b). Small group interventions were usually focused on learning and teaching approaches to raise attainment, and these were mainly implemented by support staff funded by the grant.

Participants felt they were able to demonstrate effective targeting and monitoring through internal tracking systems mainly based on teacher feedback on pupil progress. Their approach was influenced by Welsh Government guidance on self-evaluation (Welsh Government, 2023c).

It is clear, however, that schools struggle with the lack of quantifiable evidence which exists to capture the holistic impact of the PDG on learner progress and concerns exist in relation to this becoming more problematic with the rollout of the Curriculum for Wales.

Our data suggests that one of the main barriers to tracking impact was a lack of measures to capture learner outcomes not related to attainment, given the significant focus in the use of the PDG on social and emotional wellbeing. The potential for other data such as learner attendance, exclusion rates and post-16 pathways being used in this context was raised.

4. To understand effective strategies within the system and barriers to impact.

Most participants reported that their strategies were tailored to meet the specific needs of learners focusing on three areas: -

- Pupil social and emotional wellbeing: The strategies were discussed as being beneficial to enable learners to be ready for the classroom environment. ELSA and Thrive were the top named programmes used to address social and emotional and wellbeing needs. There were more focused strategies of employing a counsellor to support more complex needs. There was also an increased focus on improving pupil attendance.
- Engagement: Family and parental engagement was also a key focus designed to support pupil attainment through them seeing the value in education. Settings discussed the importance of family engagement workers in building trusting relationships to facilitate constructive communication, collaboration and identify the needs of families. In addition to engaging families, educational settings were also supporting families by starting food banks, uniform swaps and signposting to services.
- Learning and teaching interventions to raise attainment: A large number of academic interventions were used to target particular academic needs with literacy and mathematics being the most common interventions. Of the named interventions Read Write Inc and WellComm were the most common.

Teaching assistants were often employed through PDG to support these interventions.

5.1 Main findings

1. Schools and settings focus their PDG spend on three areas:
 - supporting the social and emotional wellbeing of learners;
 - family and parental engagement;
 - improvements in learning and teaching designed to raise attainment.
2. This indicates that they are using the PDG within the terms and conditions of the Welsh Government grant.
3. Because increasingly the PDG is being used to meet shortfalls in core budgets this inevitably inhibits attempts to track, monitor and rigorously evaluate the discrete impact of the grant.
4. Only approximately half of the sample of schools and settings complied with the Welsh Government requirement to publish an online statement of their use of the PDG and only some of these used the template required: this inevitably limits transparency and monitoring in relation to the grant.
5. Schools and settings believe their own internal monitoring of the use of the PDG to be effective but have mixed views on the impact of external monitoring. They would welcome additional guidance and opportunities to engage in professional learning, collaboration with other schools and professional networking.
6. They perceive there to be two main barriers in relation to capturing the full impact of the PDG:
 - The lack of robust indicators to measure the impact of the significant spend they make on emotional and social support for learners and family/parental engagement.
 - The increased pressures that have been placed on schools and school budgets in recent years at a time when poverty has been rising and ever greater demands are being made on schools.
7. Schools believe that the PDG funding formulae should be reviewed to address:
 - The impact of growing poverty on settings in the most socio-economically disadvantaged areas.
 - The barriers resulting from a single annual funding cycle.
 - Concerns around the measure eFSM as a proxy that captures all low-income households, particularly given the rollout of UPFSM.
 - The need to increase funding to keep pace with inflation.

5.2 Recommendations

1. To support both transparency in the use of the PDG by schools and external monitoring of the use of the grant, Welsh Government should support and strengthen the requirement upon schools to publish an online statement of their PDG expenditure using the template provided.
2. Welsh Government should consider an online format for reporting that supports schools in planning, targeting and monitoring PDG spend and publishing this information.
3. Welsh Government should establish a National PDG Advisory Group made up of representatives of schools, local authorities, Estyn, the Education Endowment Foundation, initial teacher education institutions and educational researchers. The responsibilities should be to:
 - Produce evidence-informed additional guidance and exemplification on the use of the PDG, including publicising the resources produced by the EEF, Welsh Government and Estyn.
 - Develop a broad range of indicators (quantitative and qualitative) which schools and external bodies can use to assess the impact of the PDG.
 - Develop a user-friendly template that allows schools to report on the outcomes of their use of the PDG to support recommendations 1 and 2.
 - Advise Welsh Government and local authorities on professional learning and professional networking that can support evidence-informed use of the PDG.
4. Given increased budgetary pressures on schools, the growth in child poverty, changes to free school meal eligibility and concerns about the current timeframes of the grant, Welsh Government - following consultation with partners - should consider a multi-year allocation and increase PDG. In addition, review the funding formula to increase core budgets given the increasing needs post COVID-19.
5. Given the problems identified in the use of PDG-LAC and to ensure that some of the most vulnerable learners in the education system are appropriately supported, the Welsh Government and Local Authorities should ensure that all care-experienced learners have access to PDG-LAC.
6. Further research is needed in the following areas:
 - Due to the limited representation of EYPDG, PDG-LAC and EOTAS (other than PRUs) in the study, further research is necessary to understand the targeting, monitoring, and challenges encountered in use of these funds.
 - Due to limited representation of wider settings in this and previous research (i.e. nurseries, independent nurseries, middle schools/ all-age schools, special schools) further research is necessary to understand the targeting, monitoring, and challenges encountered in these settings.

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Appendix

APPENDIX A: Location of educational settings

Table A.1 Phase 1 - Location of educational settings per county

North Wales	<i>N</i>	%
Conwy	3	3
Denbighshire	2	2
Flintshire	4	4
Gwynedd	3	3
Isle of Anglesey	1	1
Wrexham	5	5
Mid Wales	<i>N</i>	%
Ceredigion	2	2
Powys	6	6
Southwest Wales	<i>N</i>	%
Carmarthenshire	8	8
Neath Port Talbot	4	4
Pembrokeshire	6	6
Swansea	9	9
Southeast Wales	<i>N</i>	%
Blaenau Gwent	2	2
Bridgend	3	3
Caerphilly	7	7
Cardiff	11	11
Merthyr Tydfil	2	2
Monmouthshire	3	3
Newport	5	5
Rhondda Cynon Taf	8	8
Torfaen	3	3
Vale of Glamorgan	3	3

Table A.2 Phase 2 - Location of educational settings per county

North Wales	<i>N</i>	%
Conwy	4	4
Denbighshire	3	3
Flintshire	3	3
Gwynedd	3	3
Isle of Anglesey		
Wrexham	9	9
Mid Wales	<i>N</i>	%
Ceredigion	1	1
Powys	3	4
Southwest Wales	<i>N</i>	%
Carmarthenshire	3	3
Neath Port Talbot	10	10
Pembrokeshire	4	4
Swansea	1	1
Southeast Wales	<i>N</i>	%
Blaenau Gwent	2	2
Bridgend	13	13
Caerphilly	4	4
Cardiff	18	18
Merthyr Tydfil	1	1
Monmouthshire	4	4
Newport		
Rhondda Cynon Taf	3	3
Torfaen	1	1
Vale of Glamorgan	4	4

Table A.3 Phase 3 - Location of educational settings per county

North Wales	<i>N</i>	%
Conwy		
Denbighshire	5	24
Flintshire		
Gwynedd		
Isle of Anglesey	1	5
Wrexham	1	5
Mid Wales	<i>N</i>	%
Ceredigion		
Powys	3	14
Southwest Wales	<i>N</i>	%
Carmarthenshire		
Neath Port Talbot	8	38
Pembrokeshire		
Swansea		
Southeast Wales	<i>N</i>	%
Blaenau Gwent		
Bridgend		
Caerphilly		
Cardiff	2	10
Merthyr Tydfil	1	5
Monmouthshire		
Newport		
Rhondda Cynon Taf		
Torfaen		
Vale of Glamorgan		

APPENDIX B: Survey instrument

Section 1: Demographic Information

To better understand the context of your responses, we would appreciate it if you could provide some basic information about your role and educational setting. This information will help us analyse the data more effectively. Please note, individual responses will be kept confidential and only used for the purposes of this research.

Q1. Role in Educational Setting:

What is your current role? (Please tick all that apply)

- Headteacher
- Deputy/Assistant Headteacher
- Class Teacher
- Classroom Support Assistant/Teaching Assistant
- Other

If you selected 'Other', please specify:

Q2. Responsibility for PDG Planning, Spending, and Evaluation:

Please indicate your level of responsibility in planning, spending, and evaluating Pupil Development Grant (PDG) within your setting. Please tick all that apply.

- I am responsible for planning PDG spending
- I am involved in planning PDG spending
- I am responsible for the spending of PDG funds
- I am involved in decision-making for the spending of PDG
- I am responsible for monitoring and evaluating PDG spend
- I am involved in monitoring and evaluating PDG spend
- I am not directly involved in planning, spending, or evaluating PDG, but I am aware of the processes

Q3. Name of Your School:

Please provide the name of the school you are currently working at:

Confidentiality Assurance: Please be assured that the name of your school will be kept strictly confidential. It will only be used for the purposes of this research to ensure the accuracy and relevance of our findings. No individual schools will be identifiable in any reports or publications resulting from this study.

Q4. Educational Setting:

Please select the type of setting you are currently working in.

- Primary School
- Secondary School
- Middle/ All-Age School
- Pupil Referral Unit (PRU)
- Education Other Than at School (EOTAS)
- Specialist School
- Maintained Nursery
- Non-Maintained Nursery
- Other

If you selected 'Other', please specify:

Q5. Number of Learners:

Indicate the number of learners in your setting. If you are unsure, please give an estimate.

- 0-60
- 61-150
- 151-400
- 401-800
- 801-1200
- 1201-1600
- Over 1600

Q6. Percentage of Learners Eligible for Free School Meals (eFSM):

Please indicate your setting's percentage of learners eligible for Free School Meals. If you are not sure, please give an approximate figure.

- 0-5%

- 6-10%
- 11-15%
- 16-20%
- 21-30%
- 31-40%
- 41-50%
- 51-60%
- 61-70%
- Over 70%

Q7. Location of Setting:

In which county is your setting located?

North Wales:

- Conwy
- Denbighshire
- Flintshire
- Gwynedd
- Isle of Anglesey
- Wrexham

Mid Wales:

- Ceredigion
- Powys

Southwest Wales:

- Carmarthenshire
- Neath Port Talbot
- Pembrokeshire
- Swansea

Southeast Wales:

- Blaenau Gwent
- Bridgend
- Caerphilly
- Cardiff
- Merthyr Tydfil

- Monmouthshire
- Newport
- Rhondda Cynon Taf
- Torfaen
- Vale of Glamorgan

Section 2: Targeting and Planning PDG

In this section, we seek to understand how PDG funding is planned and targeted within your setting. We will explore the strategies and criteria for PDG allocation, focusing separately on the planning process and the specific targeting of funds.

Part A: Planning PDG Spend

First, we will focus on the planning aspect of PDG - how do you prepare and strategize the allocation of these funds.

Q8. Planning Process Considerations:

To what extent do you consider the following factors and needs in your PDG planning process? If a factor or need has not been considered, please select 'Not applicable'.

	Very important	Moderately important	Slightly important	Not important	Not applicable
Learner attainment levels					
Social and emotional wellbeing					
Access to technology					
Learners with low parental engagement					
Other					

If you selected 'Other', please specify:

Q9. Resources Used for Planning PDG Spend:

For each resource listed below, please indicate whether you have used it and how useful you have found it in planning PDG spend. If a resource has not been used, please select 'Not Used'.

	Very useful	Moderately useful	Slightly useful	Not useful	Not Used
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Welsh Government Guidance					
Estyn Guidance					
Local Authority					
Consortia					
EEF Toolkit					
Professional Networks					
Peer Support					
Independent Research					
Other					

If you selected 'Other', please specify:

Q10. Strategic Planning:

Is your PDG spending part of a long-term strategic plan?

- Yes
- No

If you selected 'Yes', please briefly describe the strategic approach.

If you selected 'No', please add any comments or thoughts including any barriers to strategic planning, as you see them.

Part B: Targeting PDG Funds

Next, let's look at how PDG funds are specifically targeted within your setting, focusing on particular groups or needs.

Q11. Identifying Targeted Groups:

Do you target specific groups of learners in your PDG planning?

- Yes

- No

Q12. Primary Target of PDG Funds:

Does your setting target its PDG spending specifically at learners who are eligible for Free School Meals (eFSM)?

- Yes – we solely target this cohort
- Yes – we partially target this cohort
- No

Q13. Detailing Targeted Groups:

For each of the following groups, indicate if they are targeted and specify the targeting criteria:

Low-income Households:

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

Care Experienced Children (includes children in the care of the local authority, those who have previously been in care and those who are subject to informal or alternative care arrangements such as kinship care):

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

English or Welsh as a Second Language Learners:

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

Gypsy, Roma and Traveller Learners:

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

Black, Asian and Minority Ethnic Learners:

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

Learners with Additional Learning Needs (ALN):

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

More Able and Talented (MAT) Learners:

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

Learners with Social, Emotional and Mental Health (SEMH) Needs:

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

Young Carers:

- Targeted (All learners)
- Targeted (Only eFSM learners)
- Not Targeted

Are there any other specific groups you target that are not listed here? Is there anything else you would like to add?

Q14. Strategies Used for Targeting:

Please select the strategies your school uses to help identify specific learners for targeted PDG spending.

Data Analysis & Tracking:

- Analysis of school-wide data to identify trends and needs
- Internal assessment data

- External assessment data and exam results
- Monitoring attendance and punctuality records
- Reviewing behaviour logs or pastoral records
- Financial need assessment based on socio-economic data

Educational and Behavioural Insights:

- Teacher observations and professional judgment
- Utilising information from previous schools or educational records
- Information in Individual Development Plans (IDPs) and Statements
- Use of tools to assess social, emotional and mental health needs (such as Boxall profiling and THRIVE)

Feedback and Collaboration:

- Feedback and input from support staff (e.g., teaching assistants)
- Engaging with parents and carers for insights into learner backgrounds and needs
- Peer reviews and collaborative discussions among teaching staff
- Referrals or reports from external agencies (e.g., social services, educational psychologists)

Learner-Centred Approaches

- Student self-assessment and self-reporting tools
- Collaboration with student councils

Please tell us about any other strategies or tools you use to help you target your PDG spending.

Q15. Barriers to Effective Targeting:

Are there any barriers to identifying needs and targeting PDG in your setting? Please tell us more about this.

Part C: Evaluation of Planning and Targeting

We would like to ask you about the broader impact of PDG funding cycles

Q16. Impact of Annual Allocation Cycle:

	Significantly enhances	Somewhat enhances	No significant impact	Somewhat diminishes	Significantly diminishes
How does the annual allocation cycle of PDG affect your ability to plan strategically?					

Please provide any additional comments or insights.

Thank you for sharing your insights on the planning and targeting of PDG funding in your setting. The next section will focus on the actual utilisation of PDG funds.

Section 3: Using PDG

In this section we'll be asking some questions about how your setting spends PDG. We will also be asking for your thoughts on barriers to effective use of PDG.

Specific Expenditures:

Please indicate the categories your school has allocated PDG funds to over the last academic year.

Q17. Staffing Costs (tick any that apply):

- Classroom Support Staff
- Family Engagement Officers (FEOs)
- Teachers
- Other

If you selected 'Other', please specify, and describe:

Q18. Staff Development and Training

- High Quality Teaching Strategies

- Leadership Development
- Staff Training on Social, Emotional and Mental Health Needs
- Other

If you selected 'Other', please specify, and describe:

Q19. Learner Support and Interventions (tick any that apply):

- Reading and Writing
- Oracy
- Numeracy
- Digital Literacy
- Music
- Sports
- Resilience and Meta-cognition
- Social, Emotional and Mental Health (e.g., THRIVE, ELSA)
- Nurture Groups
- Transition Support
- ALN (Additional Learning Needs) Support
- Support for MAT (More Able and Talented) Pupils
- Other

If you selected 'Other', please specify, and describe:

Q20. Community and Family Engagement (tick all that apply):

- Community Focused Schools
- Parent and Family Engagement Initiatives
- Community Outreach
- Multi-Agency Collaborations
- Other

If you selected 'Other', please specify, and describe:

Q21. Infrastructure and Educational Resources (tick any that apply):

- Classroom Resources
- Technology and Digital Resources
- Curriculum for Wales Implementation
- School Improvements
- Other

If you selected 'Other', please specify, and describe:

Q22. Costs Associated with Poverty (tick any that apply):

- Provision of School Uniforms
- Meals and Food
- Transportation
- Provision of Learning Resources (e.g., books, supplies)
- Supporting Families with Living Costs
- Other

If you selected 'Other', please specify, and describe:

Q23. Other Expenditures (tick any that apply):

- Extracurricular Activities
- School Trips
- Core Budget Support
- Other

If you selected 'Other', please specify, and describe:

Q24. Descriptions and Impact:

Is there anything else you would like to tell us about specific services or interventions you have purchased and their intended impact on learners?

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PDG Utilization in Practice:

The PDG is intended to support the educational attainment of children from low-income households.

Q25. This question explores the extent to which PDG is used for this purpose within your setting. Please express your level of agreement with the following statements, in the context of your setting:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Our setting's PDG funding is sufficient to meet the identified needs of our eFSM learners.					
There has been an increase in complex learner needs since the Covid-19 pandemic.					
There has been an increase in material poverty and deprivation among our learners.					
We have had to use PDG funding to support our setting's core budget due to financial challenges.					
PDG funding is diverted to support areas beyond its original intended purpose, such as ALN budgets.					
Our setting must frequently prioritize immediate or short-term needs over long-term educational goals when using PDG funding.					
The cost of living crisis has required us to reallocate PDG funds to meet basic needs of learners, such as meals and clothing.					
We must frequently prioritize immediate or short-term needs over long-term educational goals when using PDG funding.					
Current PDG funding levels have not kept pace with the rising costs associated with educational resources and support.					
There is a lack of clarity and guidance on the appropriate use of PDG funds, leading to challenges in allocation.					

Our setting has successfully adapted PDG funding strategies to meet evolving educational challenges.					
PDG funding has enabled us to implement innovative programmes that address the specific needs of our eFSM learners.					
We have seen measurable improvements in learner outcomes as a direct result of initiatives funded by the PDG.					
Our setting has been able to sustain key educational services and support despite financial pressures, thanks to effective PDG management.					

For each statement where you indicated any level of agreement or disagreement, please provide additional details or context if you would like to.

Section 4: Monitoring and Governance

This final section focuses on your school's practices in tracking, evaluating, and governing PDG spending.

Q26. PDG Coordination and Oversight:

Does your school have a designated PDG Coordinator or equivalent role?

- Yes
- No

If you answered 'Yes', could you briefly describe their responsibilities?

Q27. Tracking PDG Expenditure:

How does your setting track PDG spending throughout the academic year? (tick any that apply)

- Regular financial reporting
- Use of dedicated software or tracking tools
- Periodic reviews by the PDG coordinator or leadership team
- Collaborative tracking with department heads or teachers
- Other

Not Applicable

If you selected 'Other', please specify:

Q28. Self-Evaluation Practices:

Does your school regularly self-evaluate its use of PDG funding?

- Yes, systematically
- Yes, informally or sporadically
- No

If you selected 'Yes', how frequently does this self-evaluation occur?

- Annually
- Biannually
- After each major initiative
- Other

If you selected 'Other', please specify:

Q29. Evaluating Impact:

How does your school evaluate the impact of PDG-funded initiatives? Please tick any that apply.

- Student performance and progress data analysis
- Feedback from teachers, staff, and students
- Parental feedback and engagement measures
- Comparison with pre-defined educational targets
- External evaluations or benchmarking
- Other

If you selected 'Other', please specify:

Q30. Staff Confidence in Evaluating Impact:

	Very confident	Moderately confident	Slightly confident	Not at all Confident
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How confident do staff feel in their ability to assess the impact of PDG-funded initiatives?				
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Q31. Resources Used for Evaluating the Impact of PDG Spend:

We'd like to know about the resources, organisations and tools that have supported you in evaluating the effectiveness of your PDG spend. For each resource listed below, please indicate whether you have used it and how useful you have found it. If a resource has not been used, please select 'Not Used'.

	Very useful	Moderately useful	Slightly useful	Not useful	Not Used
Welsh Government Guidance					
Estyn Guidance					
Local Authority					
Consortia					
Educational Endowment Foundation					
Professional Networks					
Peer Support					
Other					

If you selected 'Other', please specify:

Q32. Informing Future Plans:

How do the results of PDG self-evaluation inform your future planning? Please tick any that apply.

- Adjustments made to ongoing initiatives
- Informing next year's PDG spending plan
- Strategic changes in school-wide educational approaches
- No significant changes made based on assessments
- Other

If you selected 'Other', please specify:

Q33. Guidance for Self-Evaluation:

Do you feel your setting has sufficient guidance to help you robustly assess the impact of your PDG spending?

- Yes
- No

Would you like to tell us more about this?

Q34. Ensuring Accountability:

What mechanisms does your school use to promote accountability in PDG spending?
Please tick any that apply.

- Regular reporting to school governors, boards or consortia
- Engagement with external audit or review bodies
- Transparent reporting to the school community
- Documentation and record-keeping for official oversight
- Publishing a PDG school statement on website
- Incorporation into School Development Plan
- Other

If you selected 'Other', please specify:

Q35. Challenges and Obstacles in Monitoring and Evaluation:

Can you tell us about any challenges or obstacles in monitoring and evaluating PDG spending?

Q36. Suggestions for Improvement:

Based on your experience, what improvements could be made to the monitoring and governance of PDG in your setting?

Q37. Future needs:

What are the future needs in relation to PDG?

APPENDIX C: Interview Schedule

Warm-up	Prompts
<p>Tell me about yourself. How long have you been in this role? Tell me about this setting.</p>	<p>Previous experience eFSM, size of setting, location</p>
Themes	
<p>Targeting:</p> <p>How have you been using the PDG during the last few years?</p> <p>(Note: If this is a secondary school there may be a different focus e.g., more money allocated at GCSE stage. If this is a primary school, they may employ TAs. Ask what the TAs do.)</p> <p>How do you target your PDG?</p> <p>What is the primary need you feel the PDG needs to address?</p> <p>Do you use the PDG for improvements in learning and teaching?</p> <p>What other things to you use the PDG for?</p>	<p>Has there been a change in focus? Possibly since Covid-19?</p> <p>Are there issues that are more pressing than the attainment gap?</p> <p>Improvements in attendance, wellbeing, community focused school work, etc.</p>
<p>Do you think the eFSM is an appropriate way to define disadvantage?</p> <p>How would you define disadvantaged learners?</p>	<p>What other measures could be used?</p> <p>Is disadvantage more than income-related?</p>
<p>Monitoring and governance:</p> <p>What do you think of the monitoring of the grant?</p> <p>What forms of monitoring do you do in your setting?</p> <p>What would be appropriate monitoring of the grant?</p> <p>Who supports you the most to get the best out of PDG?</p>	<p>Does the monitoring support your use of the PDG?</p>
<p>Strategies:</p> <p>What strategies do you use in your setting? Why?</p> <p>What evidence do you draw upon in deciding to use these strategies?</p>	<p>Are they targeted or universal?</p>

<p>How do you establish if these strategies have been effective?</p> <p>Are you facing any challenges when implementing the strategies funded by the PDG? If so, can you give an example?</p> <p>What are the barriers to PDG funding that might limit the impact on the poverty-related attainment gap?</p>	<p>Guidance from government/ EEF/ own research/ other professionals.</p> <p>Funding cycle/out-of-date allocation/ lack of advice/ more than poverty?</p>
<p>Impact:</p> <p>The current way for us to see the attainment gap is at GCSE stage. Is this fair to measure the attainment gap this way?</p> <p>How do your educational settings monitor and track impact?</p> <p>What are the barriers to tracking impact?</p> <p>What support do schools need to demonstrate the impact of PDG?</p> <p>What system-wide issues need to be understood about PDG and the attainment gap?</p>	<p>Lack of monitoring / New Curriculum/ not adequate monitoring systems</p> <p>Lack of funding/ cost of living crisis/ more needs in the system/ pressure from other policies.</p>
<p>Future needs:</p> <p>What do you need going forward to support disadvantaged learners?</p> <p>Does the PDG need to change in future? If so, in what ways?</p>	

APPENDIX D: Externally provided programmes and approaches purchased via the PDG funding

Table 19 Externally provided programmes and approaches

Wellbeing and Parental engagement			
Name of programme, approach, project, or software	Link to/ information about the programme, approach, project, or software	N	%
Lego therapy	Lego therapy website	5	6
ELSA	Information about ELSA	25	32
KiVa	KiVa website	1	1
Thrive	Thrive website	17	22
Boxall	Information about Boxall	2	3
PERMA	Information about PERMA model	1	1
Positive play	Positive play website	4	5
SPEAKR	Information about SPEAKR	1	1
Emotion Coaching	Information about Emotion Coaching	1	1
Roots to Empathy	Roots to Empathy website	1	1
Thinking Detectives	Information about Thinking Detectives	1	1
Think Equal	Think Equal website	1	1
Lles	Information about Lles	1	1
Nurture sessions	Information about Nurture sessions	4	5
World of Words	World of Words website	1	1

Talkabout	Information about Talkabout	1	1
SWEET Project	SWEET Project website	1	1
Foundations of Community Engagement	Foundation of Community Engagement website	1	1
RADY	Information about RADY	1	1
Trauma informed school (TiS)	Information about Trauma informed school	2	3
Dads and Lads Programme	None available	1	1
Transition to secondary school project	None available	1	1
My Concern	My Concern website	1	1
Whole school approach	Information about Whole school approach	1	1
Jigsaw	Jigsaw website	1	1
Early Help Hub	Information about Early Help Hub	1	1
Men Behaving Dadly	Information about Men behaving Dadly	1	1
	TOTAL	79	
Literacy			
Name of programme, approach, project, or software	Link to/ information about the programme, approach, project, or software	N	%
Toe by Toe	Information about Toe by Toe	2	3
LEXIA	LEXIA website	4	7
Read, Write Inc.	Information about Read, Write Inc.	9	15
Catch Up Literacy	Catch Up Literacy website.	3	5
Literacy Launch Pad	Information about Literacy Launch Pad	1	2
Active Literacy Kit	Information about Active Literacy Kit	1	2
Nessy	Nessy website	3	5

Letters and Sounds	Information about Letters and Sounds	1	2
Children's Assessment Teaching Tool (ChaTT)	Information about ChaTT	3	5
WellComm speech and language programme	Information about WellComm .	6	10
Communication Intervention Team (ComIT)	Information about ComIT	1	2
Programme of Phoneme Awareness Training (POPAT)	POPAT website	3	5
Rapid Reading	Information about Rapid Reading	1	2
Twinkl (Phonics)	Twinkl website	1	2
Letter-Join	Letter-Join website	1	2
Research in Language and Literacy, Speech/Language (RiLL)	Information about RiLL	1	2
Reading Power Inc.	Reading Power Inc. website	1	2
Teaching Talking Intervention	Information about Teaching Talking	1	2
Tric a Chlic	Tric a Chlic website	2	3
Teaching Reading Using Games (TRUGS)	TRUGS website	1	2
Oxford Reading Buddy	Oxford Reading Buddy	1	2
Tricky Words	Information about Tricky Words.	1	2
Read on. Get on	Information about Read on. Get on	1	2
Reading eggs	Reading eggs website	1	2
Voice 21	Voice 21 website	1	2
Spelling initiative	None available	1	2
Learning Village	Learning Village website	1	2
British Picture Vocabulary Scale (BPVS)	Information about BPVS	1	2

Precision Teaching	Information about Precision Teaching	1	2
Active Learn	Active Learn website	1	2
Step Up programme	Information about Step Up Programme	1	2
ASDAN	ASDAN website	1	2
IDL programme	IDL website	1	2
	TOTAL	59	
Numeracy			
Name of programme, approach, project, or software	Link to/ information about the programme, approach, project, or software	N	%
Power of 2	Information about Power of 2	1	8
Plus 1	Information about Plus 1	1	8
My Maths	My Maths website	1	8
Catch up Numeracy	Catch up Numeracy website	3	23
Rapid Maths	Information about Rapid Maths	2	15
Power Maths	Information about Power Maths	1	8
Numicon	Information about Numicon	2	15
Mathseeds	Mathseeds website	1	8
Emile Maths	Information about Emile Maths	1	8
	TOTAL	13	
Arts, cultural, extracurricular, and Physical activity/ sports			
Name of programme, approach, project, or software	Link to/ information about the programme, approach, project, or software	N	%

Music lessons (Gwent Music & Upbeat)	Gwent Music website	1	14
Ballet Cymru	Ballet Cymru website	1	14
Inspirational Ballet for Under 7-	None available	1	14
One World Club	One World website	1	14
Urdd Membership	Urdd website	1	14
Next Gen Sports Academy	Next Gen Sports Academy website	1	14
Dragon Rugby	Dragon Rugby website	1	14
	TOTAL	7	
Other			
Name of programme, approach, project, or software	Link to/ information about the programme, approach, project, or software	N	%
Microsoft Learn Student Ambassadors (MILSA)	Information about MILSA	1	100
	TOTAL	1	