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Review of the Pupil Development Grant: Final report - September 2023

Research

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Review of the Pupil Development Grant

- Audience** Welsh Government policymakers; local authorities; regional consortia; national and local bodies in Wales and schools' 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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List of abbreviations

ALN	Additional Learning Needs
ASF	Attainment Scotland Fund
BAME	Black, Asian and minority ethnic
CBA	Cost Benefit Analysis
CCA	Cost Consequence Analysis
CEA	Cost Effectiveness Analysis
CFF	Common Funding Formula
CFS	Common Funding Scheme
CAMHS	Child and Adolescent Mental Health Service
DEIS	Delivering Equality of Opportunity in Schools
DfE	Department for Education
DPMT-R	Drumcondra Primary Mathematics Test - Revised
DSRT	Drumcondra Sentence Reading Test
DWP	Department for Work and Pensions
EEF	Education Endowment Foundation
e-FSM	Eligible for Free School Meals
EIG	Education Improvement Grant
Ever-6	Pupil will be eligible for Pupil Premium for a period of six years regardless of if they remain eligible for free school meals. This group of learners are referred to as 'Ever-6'.
FSME	Free School Meal Entitlement
GCSE	General Certificate or Secondary Education
HSCL	Home School Community Liaison scheme
IDACI	Income Deprivation Affecting Children Index
JCE	Junior Certificate Examination
JCSP	Junior Certificate School Programme
LA	Local Authority
LAC	Looked After Children
LCAP	Leaving Certificate Applied Programme
MCDA	Multi-Criteria Decision Analysis
MAT	More Able and Talented

NIAO	Northern Ireland Audit Office
NIMDM	Northern Ireland Multiple Deprivation Measures
NPD	National Pupil Database
NRPF	No Recourse to Public Funds
OECD	Organisation for Economic Co-operation and Development
OPS	Overall Performance Score
PDG	Pupil Development Grant
PDST	Professional Development Service for Teachers
PEF	Pupil Equity Fund
PIRLS	Progress in International Reading Literacy Study
PISA	Programme for International Student Assessment
PLASC	Pupil Level Annual School Census
PLC	Professional Learning Community
PP	Pupil Premium
PRISMA	Preferred Reporting Items for Systematic Reviews and Meta-Analyses
PROSPERO	International prospective register of systematic reviews
PRU	Pupil Referral Unit
ROI	Republic of Ireland
SCP	School Completion Programme
SDP	School Development Plan
SEN	Special Educational Needs
SMART	Specific, Measurable, Achievable, Relevant and Timebound
SQR	Standards and Quality Reports
SSP	School Support Programme
TA	Teaching Assistant
TIMSS	Trends in International Mathematics and Science Study
TSN	Targeting Social Need
WG	Welsh Government

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Executive Summary

Introduction

This report synthesises the following evidence collected by the review:

1.1 The School of Educational Sciences, Bangor University was commissioned to conduct a review of the effective targeting of the Welsh Government's Pupil Development Grant (PDG). The PDG was launched in 2012 and provides schools with additional funding. The amount is calculated based on the proportion of learners registered for free school meals (e-FSM). Schools are given the funding to reduce the barriers faced by learners from socio-economically disadvantaged backgrounds to support the closing of the attainment gap between socio-economically disadvantaged learners and non-disadvantaged learners.

1.2 The aims of the review were to consider:

- The use of the PDG in Wales.
- How similar grants are used in some other countries (England, Scotland, Northern Ireland, and the Republic of Ireland).
- The main indicators schools use to target funds and design interventions.
- How evidence of outcomes are captured and reported.
- How resource allocation and targeting at school-level can be more evidence informed.

1.3 A rapid review of funding streams targeted at socio-economically disadvantaged learners in Wales and the wider UK and the Republic of Ireland. The rapid review focused on the grant objectives, design, resource allocation, implementation and monitoring and evaluation.

1.4 Surveys administered with organisations in the middle tier of the education system in Wales and Welsh Government officials, to capture their views on the targeting, monitoring, outcomes, transparency, and future needs of the PDG.

1.5 In-depth interviews with representatives of the middle tier of the education system.

1.6 Because of the pressures schools are currently facing, the Welsh Government asked the team not to seek their views. This is, therefore, a limitation to the findings of the review as schools were not consulted about their views of PDG.

1.7 While other Welsh Government grants such as the *Education Improvement Grant (EIG)* and COVID-19 catchup funding may also benefit socio-economically disadvantaged learners, they were outside the scope of this review.

1.8 The Welsh Government also provides a School Essentials Grant (previously called the PDG Access or School Uniform Grant). It is administered by local

authorities and paid to families whose children are eligible for free school meals can claim the grant for purchase of school uniform, sports clothing, equipment, and enrichment activities. This grant was also not included within the scope of the review.

Summary of Findings

The Rapid Review

Nations allocate funding on one of the following bases:

- Individual learner characteristics – Based on the individual characteristics of each learner (Wales and England)
- School-level – Based on the school’s characteristics, for example the percentage of learners that are classed as disadvantaged (Northern Ireland & Scotland)
- Geographical area – Funding is targeted to regions or areas that are classed as disadvantaged (Republic of Ireland)

1.9 All the UK nations use eligibility for free school meals (e-FSM) as an indicator of socio-economic disadvantage. The Republic of Ireland (ROI) use the Pobal Haase and Pratschke (HP) Deprivation Index¹ and school data. At primary-level, the school data consists of data generated via a survey instrument conducted by the Educational Research Centre. School principals are required to provide information related to the percentage of learners in the school that have the following characteristics: unemployed parents, living in LA accommodation, from lone parent families or large families of more than five children, as well as traveller ethnicity and learners eligible for the free books scheme². At secondary-level, the school data is taken from the percentage of learners with medical cards, school-level retention rates for several cohorts and Junior Certificate achievement data over a period (Department of Education, 2022).

1.10 Funding is allocated on an annual basis to schools in Wales, England, Northern Ireland, and the Republic of Ireland, and in Scotland on a four-year cycle.

1.11 There is wide variation in the use of the funds, and this includes both academic and holistic support³ in all nations.

¹ The HP Deprivation Index is specific to Ireland and is a series of coded maps detailing area deprivation and affluence. Data is collated from the census using Demographic Profile, Social Class Composition and Labour Market indicators (Haase and Pratschke, 2020).

² As the policy stands for this review parents on low incomes were able to access support to with the cost of books. New grants are available from the academic year 2023/24 means parents will no longer contribute to the cost of books in the primary sector.

³ Academic support included interventions that were targeted at literacy, oracy and reading. Holistic interventions focused on social and emotional skills, mental health, and wellbeing of learners.

- 1.12 Research suggests school leaders tend to target funding at a broader range of learners than just those who are e-FSM, using their own local knowledge of learners to identify wider disadvantage across all nations.
- 1.13 Schools in all nations use funding to address high teacher turnover, lack of qualified staff, limited parental engagement, and a range of social and emotional issues.
- 1.14 Some schools spend funding on services or activities to address the wider issues related to poverty and socio-economic disadvantage other than those intended to impact directly on learner attainment. This was evident across all nations.
- 1.15 In Wales common uses of PDG included:
- A strong focus on supporting numeracy and literacy.
 - Parental engagement.
 - Training and deployment of staff including teaching assistants.
 - Employing specialist services within schools.
 - Co-operative working with schools, LAs and regional consortia.
 - Improving attendance.
- 1.16 Whilst there is some evidence to suggest that the impact of the funding is improving the outcomes of socio-economically disadvantaged learners. In Wales there is a lack of quantitative evidence from sources such as large-scale national literacy and numeracy data to suggest that significant impact has been made and that this has led to a narrowing of the attainment gap. The available evidence of impact is mixed.
- 1.17 In Wales and England there is a lack of detailed information available on how schools are using funding to support socio-economically disadvantaged learners. Whilst schools are required to report on their spending activities, for example through the publication of statements on their school website, there is no central collation of this key information. This amounts to an accountability endeavour for school leaders that does not benefit the education system. While the information on spending gives information to parents and the community, it is a missed opportunity to use existing information in a transformative way.
- 1.18 Northern Ireland and Scotland have central platforms that provide information on the spend of their grants. In Scotland, information is also collated by the LAs. Although not systematic, there is some evidence that this data is being used to inform best practice and identify effective activities.
- 1.19 The Republic of Ireland have a clear monitoring system which produces quality data on the effectiveness of funding. This represents an example of how effective monitoring can support decision makers to align policy with data findings.
- 1.20 None of the nations have evidence on the cost-effectiveness of the grants, based on economic evaluation. Changes in e-FSM eligibility over time makes it

difficult to measure the cost-effectiveness of funding.

The Survey

- 1.21 Some respondents felt that e-FSM fails to capture and target all disadvantaged learners, some of whom may face disadvantages not necessarily deriving from socio-economic status such as poor attendance or lack of parental support. Furthermore, they considered that schools use the funding for numerous purposes. There is also turbulence in relation to this indicator, with families moving in and out of eligibility. For these reasons, 90% (n=26) of respondents agreed and strongly agreed that there should be other measures of disadvantage; only 3% (n=1) disagreed with this statement. The introduction of universal eligibility for free school meals in primary schools would also require alternative indicators of disadvantage in the future.
- 1.22 Although the respondents feel that practice is effective, they believe that schools need more detailed guidance on the implementation of grant use. Given that schools are utilising the PDG to address a wide range of additional barriers to learning/attainment that may not reflect the specific aims of the grant and exposes a potential lack of holistic approach in (i) grant funding aims, (ii) guidance on addressing a range of learner barriers, and (iii) capturing impact on learner outcomes of schools' funding use.
- 1.23 A total of 64% (n=18) respondents agreed and strongly agreed that there needs to be better monitoring of the impact of the PDG. Conversely, 29% (n=8) respondents disagreed and strongly disagreed with the statement. Overall, respondents indicated that the grant is being implemented effectively but nonetheless, they pointed out that the late receipt of the grant meant that provision cannot always be planned effectively, and this can lead to schools not being able to embed practice, particularly as the grant cycle is short. The lack of strategic planning created reactive rather than preventative spending patterns. Poor monitoring activities and schools not using the grant for the intended purpose also undermines the identification of effective practice.

Interviews

- 1.24 Participants felt that there were some examples of good practice in relation to targeting and monitoring of the PDG, but in general this was limited, and more effective practice was needed in this area in schools, regional consortia, and local authorities.
- 1.25 Respondents also believe that the impact of other grants needs to be considered as other grants may align with the aims of the PDG grant and that a wider range of outcomes should be included given the broad use of PDG funding.
- 1.26 The terms and conditions of the grant often prevented schools from being able to embed practice and plan strategically. The availability of the PDG for a

financial rather than academic year restricted planning timescales. Funding allocations were up to 18 months out of date leading to schools not being able to allocate funding to current learners.

- 1.27 The Early Years PDG lacks the strategic coordination and leadership at local authority/regional consortia level that is in place for the LAC and main PDG sources.
- 1.28 Participants discussed a lack of transparency in PDG spending in schools, local authorities, and regional consortia. Some schools, for example, were using PDG to maintain core staffing levels.
- 1.29 Participants believed there should be more professional learning available on socio-economic disadvantage from initial teacher training onwards.
- 1.30 More guidance should be available for schools, local authorities, and regional consortia on the effective use of the PDG and wider interventions to tackle the impact of poverty on attainment.
- 1.31 There should be greater collaboration between schools to share effective practice and resources. Schools should also be working with their communities to support socio-economically disadvantaged learners.
- 1.32 There should also be more collaborative working at system level with local authorities, regional consortia and Welsh Government working together to tackle the impact of poverty on attainment.

Recommendations

- 1.33 Schools were not within the scope of this research project thus, identifying effective strategies and targeting is only limited to the perspectives of the middle tier of the education system. The Welsh Government should consider interviewing schools to identify the views of school staff around the effective strategies, monitoring activities and targeting of the PDG.
- 1.34 Given the introduction of universal entitlement to FSM in primary schools, Welsh Government should reconsider the approach to calculating PDG due to concerns around the data set being compromised by universal free school meals.
- 1.35 Welsh Government should provide regularly updated and clear guidance to schools, local authorities, and regional consortia on effective, evidence-informed use of the PDG.
- 1.36 Welsh Government should fund research to be conducted with schools to explore the targeting and areas of effective practice with regards to PDG. This could identify areas of need.

- 1.37 Welsh Government should ensure that higher-education institutions, local authorities, and regional consortia provide career-long professional learning for education professionals on the impacts of socio-economic disadvantage on learning. Including how funding can be used effectively to mitigate the poverty related attainment gap. This needs to be embedded in the workforce beginning in initial teacher education.
- 1.38 Welsh Government should consider changes to the administration of the PDG so that it can be better aligned to school planning cycles.
- 1.39 PDG funding is generally confirmed annually. This may hinder schools in planning long-term strategies. Closing the attainment gap is a long-term goal; hence the Welsh Government should allocate the PDG on 4/5-year cycles to allow schools to plan longer term strategies, embed practice and retain staff.
- 1.40 Whilst final decisions on the use of the grant should rest with headteachers, the Welsh Government should provide clear guidance on what the PDG may and may not be used to fund.
- 1.41 The Welsh Government, local authorities and regional consortia should work together more closely to ensure the effective use of the PDG.
- 1.42 The Welsh Government, local authorities and school improvement services should agree a consistent approach to learner progression that they will collectively use, and encourage schools to use, in monitoring and evaluating the impact of the PDG on wellbeing and attainment, particularly with respect to early literacy and numeracy. This information can feed into to work already being carried out on the wider information ecosystem in the Welsh education system [Developing a new data and information ecosystem that supports the reformed school system in Wales.](#)
- 1.43 The information on the use of the PDG reported by schools should be collated by local authorities and the Welsh Government to provide a repository of existing practice. Northern Ireland and Scotland provide examples of how this might be done.
- 1.44 Schools should report transparently on PDG spending and activities in relation to the guidance provided by Welsh Government. The transparency would allow the identification of areas of spending patterns and areas of need in the education system.
- 1.45 Robust monitoring and evaluation processes should be agreed by the Welsh Government, local authorities, and regional consortia for schools to use in relation to their use of the PDG. The Republic of Ireland provides an example of how this might be done.

1.46 Welsh Government should increase the level of funding for all elements of PDG so that schools can address the increasing challenges they face in narrowing the attainment gap.

1. Introduction

Background and policy context

1.1 Education policy in Wales has had a strong focus on addressing the poverty attainment gap since devolution in 1999. The first grant that specifically targeted socio-economic disadvantage was RAISE in 2006 and was based on the number of learners entitled to free school meals. England introduced the Pupil Premium in 2010, soon after the Pupil Deprivation Grant (now the Pupil Development Grant) was introduced. [Our National Mission](#) 2017 (GOV.WALES.UK, 2017) reasserted the commitment from the Welsh Government, with a commitment to expand PDG. The [Programme for Government](#) in 2020 (GOV.WALES.UK, 2021) heightened this commitment leading to the education minister making an [Oral Statement](#) on 22 March 2022 (Senedd Cymru, 2023) and a keynote speech to the [Bevan Foundation](#) on 20 April 2022 (GOV.WALES.UK, 2022b). This ambition was most recently reinforced in the release of the [Our National Mission roadmap](#) (GOV.WALES.UK, 2023a).

Equity and disadvantaged learners

1.2 The attainment gap between learners from more socio-economically advantaged and disadvantaged backgrounds has been an ongoing concern for education policy makers (Mowat, 2018). While education is regarded as a human right for all children, learners from disadvantaged backgrounds consistently leave school by the end of key stage 4 up to 18 months behind non-disadvantaged learners in England. This was measured using the average number of qualifications held by type (e.g., AS and A levels, applied general and non-academic Level 3 qualifications) and disadvantage status (learners that were in receipt of FSM at any point in the six years before finishing key stage 4 were classified as being 'disadvantaged') (Hunt et al., 2021). Over recent years, learners in Wales have underperformed on key measures compared to other UK nations (ap Gruffudd et al., 2017). The most recent analysis shows that Wales is below the OECD average and is yet to meet the Welsh Government target of scoring 500 in each subject in the Programme for International Student Assessment (PISA) (Senedd.wales.uk, 2018). There has been little progress made on narrowing the attainment gap over the last ten years and Wales continues to fall behind England in the GCSE attainment gap (Cardim-Dias and Sibieta, 2022). Recent research suggests that due to the global pandemic, the attainment gap has increased for disadvantaged learners in the UK (Twist, Jones, and Treleaven, 2022).

1.3 The long-term impacts or “long-shadow” of leaving school with poor education can have negative impact throughout the life course, including: unstable employment, poverty, insecure housing, and a lack of social mobility (Andrews, Robinson, and Hutchinson, 2017). There is also evidence of increased entry into the criminal justice system, welfare reliance, and intergenerational transfer of poverty and poor attainment (Zajacova and Lawrence, 2018).

1.4 One way that governments have attempted to reduce the attainment gap is to introduce additional targeted funding to support “fairness of opportunity” through the education system. The most important example of this in Wales is the Pupil Development Grant (PDG), introduced by the devolved Welsh education administration in 2012. Other UK nations have similar policies, for example, in England the Pupil Premium (PP), in Scotland the Pupil Equity Fund (PEF), and in Northern Ireland, the Common Funding Formula (CFF). These funds are awarded directly to schools (based on the number of pupils eligible for free school meals) to fund additional support and provision to improve outcomes for disadvantaged learners.

1.5 In Wales, schools currently receive £1,150 in PDG for each learner entitled to free school meals (e-FSM) and learners in Local Authority Care (LAC) (Welsh Government, 2018) and is distributed through local authorities. Spending on education overall per pupil fell by 6% in real terms between 2009-10 and 2018-19 which suggests that the funding is not keeping pace with costs (Sibieta, 2020). Recent analysis post COVID-19 suggests that spending levels have now recovered per pupil to 2010 levels. Spending increased 8% between 2019- 2023 in England and Wales (Sibieta,2023). All UK nations have seen an increase in real term spending with the government being committed to financially supporting the recovery of the education systems due to the disruption of the pandemic. In addition, there is evidence that in some contexts the targeting of the funding is failing to achieve the government policy outcome targets, with less focus on deprivation funding than in England (Sibieta, 2020).

1.6 In England, on top of the main Pupil Premium there is the additional Pupil Premium Plus (PP+) that targets learners who are in the care of the local authority (LAC); this funding is distributed to Virtual School Heads⁴. While there is relative autonomy on how additional funding (PP and PP+) are used, there is some consensus that the money is often not being spent in effective and efficient ways (i.e., cost-effective), and the funding often does not reach those most in need of support (Read, Macer and Parfitt, 2020; Gorard, 2022). LAC learners and learners in key stage 4, for example, have demonstrated disappointing outcomes, indicating a widening of the attainment gap after initial positive progress (Mannay and Lyttleton-Smith, 2019; Read, Macer and Parfitt, 2020). In Wales, PDG for LAC learners is administered through the regional consortia who deliver strategic interventions and activities. The regional consortia have autonomy over how they use the grant and tend not to utilize the grant to sustain permanent staff or statutory roles that are expected to be conducted by the schools or LA.

1.7 In the case of both the PDG (Wales) and PP (England), schools are ‘encouraged’ to seek evidence-based interventions from organizations such as the

⁴ Virtual School Heads are not physically in school, they work with the Local Authority team, education providers and other stakeholders in the learner's life. Their purpose is to use the PP+ to maximise the learners' potential.

Education Endowment Foundation (Hilton, 2017), and school leaders have considerable autonomy to identify and employ interventions that suit the needs of their learners (Crenna-Jennings, 2018). However, some school leaders suggest that using evidence from research was less important compared to their local knowledge of what worked best for their learners (Morris and Dobson, 2020). A recent study working with a cluster of schools in Wales demonstrated that out of the 138 recorded interventions in use, 67% had no evidence base and only 30% have some evidence of positive impact on learner outcomes (Pegram et al., 2022). Schools also might struggle to achieve desired outcomes from effective strategies due to the challenges of ensuring fidelity of implementation (leading to ineffective practice) (Gorard, See and Siddiqui, 2020). While there is research that supports the consensus that extra spending directed at disadvantaged learners does have positive impacts (Jackson, 2020; Gibbons, McNally, and Viarengo, 2018) Gorard (2022) suggests that there is still some work to identify effective and cost-effective allocations of funds to support learner outcomes.

1.8 There is evidence that schools, particularly primary schools, utilize PDG on additional teaching assistants and targeted interventions (Pye et al., 2015). Some schools use funding to encompass a wide range of activities including academic interventions, social and behavioral interventions, and other activities such as paying for school trips or employing speech and language therapists or educational psychologists (Morris and Dobson, 2020; Teach First, 2021) as learners are entering school with complex needs that will impede their ability to learn.

1.9 School leaders are required to contextualise wider issues in their decisions such as the cohort, demographics, parental engagement, and wider welfare issues. This became particularly acute in the pandemic (Moss et al., 2021). These wider contextual issues can include cuts to welfare, particularly to social services and the NHS, meaning leaders having to employ services, for example speech therapists, that were previously provided by other sectors (Morris and Dobson, 2020). The long waiting lists and high thresholds of other sectors, caused by budget cuts, further culminate in schools having to provide the support within their own setting. A recent review from Teach First (2021) highlighted that the cuts to social care and early years has meant that schools are now increasingly having to devote money and time to addressing non-attainment issues. While there is a complex interplay between social services and Child and Adolescence Mental Health Services (CAMHS), funders need to recognise the additional resources needed if schools are going to be focusing on a more holistic approach to provision that might have been provided elsewhere in the system previously.

1.10 There is evidence that the targeting of funding is not reaching the learners in most need and this broadly relates to areas of deep/persistent poverty, rural settings where there is a lack of wider services and employment opportunities, and the sensitivity of e-FSM as a proxy measure of deprivation (ap Gruffudd et al., 2012; Gray and Bradford, 2018). An example would be learners in equivalised poverty: in

Wales approximately 18% of learners are e-FSM but 31% are living in equivalised poverty (Taylor, 2018)⁵. In England there are 800,000 learners, and in Wales 25,000, who are living below the poverty line that are not eligible to claim FSM (Child Poverty Action Group, 2022). The eligibility criteria therefore need further investigation. There are also concerns around the funding formulae at a LA level, with large discrepancies in the per-pupil allocation of core funding that schools receive (Sibieta, 2020). England have expanded deprivation provision based on 'Ever 6', whereby learners who have been eligible for PP will continue for 6 years even if the learner is no longer eligible for FSM ([GOV.2021](#)). England have also developed a national funding formula that replaces the 152 different local authority formulae to try to negate the large differences in per-pupil spending (Belfield and Sibieta, 2017).

1.11 Other policy contexts are important to consider that link with e-FSM. There are currently changes to the welfare system – for instance, Universal Credit amalgamates the separate benefits into one payment (Brewer et al., 2019) meaning that some families will miss out on e-FSM who were previously entitled. While transitional protection was put in place long term analysis of the changes could see learners and their families miss out on e-FSM (Joyce and Walters, 2018). A difficulty for schools is parents or carers not registering to claim e-FSM through either the LA or the school. This results in many learners missing out on a daily meal and schools missing out on additional funds; in England 14% of learners entitled to claim FSM are not claiming (Iniesta-Martinez and Evans, 2012) and some analysis suggesting that there is a stigma attached to the take up of FSM (Woodward et al., 2015).

1.12 While some of these issues are outside of the funding of PDG they are important contextual issues that need to be considered when targeting PDG. Egan (2016) suggests that the attainment gap cannot be tackled one dimensionally within the school setting and that wider factors need to be understood to try to mitigate the attainment gap. Given the current challenging economic situation, coupled with the demands of delivering the new curriculum for Wales, this research will be a critical addition to support decision-making regarding the focus and targeting of PDG to ensure that disadvantaged learners are supported to improve the outcomes they achieve, and wider education inequalities are reduced.

1.13 While there is a drive within education systems to be more evidence-informed, little work has been done around economic evaluations in education to support decision makers on cost-effective strategies (Levin et al., 2017). There is evidence that investment in early years education can have long-term impacts on attainment (Belfield, Crawford and Sibieta, 2018; Edwards et al., 2016). Work from researchers such as Heckman (2012) (see the Heckman Curve) and parent-child centres have demonstrated that early years' interventions have positive effects over the life course (Heckman, 2012; Temple and Reynolds, 2007; Rea and Burton, 2020). Perry Preschool, Abecedarian and Head Start are all large-scale interventions

⁵ Equivalised poverty is the process of adjusting incomes for household size.

that have had some economic evaluation around the long-term benefits to the learners targeted (Belfield et al., 2006; Barnett and Masse, 2007; Ludwig and Phillips, 2007). We do know that targeting funding to disadvantaged cohorts can have impact and support a range of outcomes including attainment. Recent analysis on the PP showed the policy may be working to reduce the attainment gap in England (Gorard, Siddiqui and See, 2021) but this information is lacking in Wales. An economic evaluation was conducted on the foundation phase in Wales using a cost consequence methodology (Taylor et al., 2015) which is a common economic evaluation method in healthcare (Morris, Devlin, and Parkin, 2007) but limited in use in the field of education policies. Economic evaluations provide all the information for decision makers on what works (effectiveness) and the cost (economic evaluation) and could be a powerful tool in decision making and evidence-informed policy design.

1.14 To summarise:

- There is a significant and continuing attainment gap in Wales.
- This has a long-term detrimental impact on low-attaining learners.
- There are a number of strands to the PDG including PDG LAC.
- The deprivation factor as part of the funding formula at local authority level lacks transparency leading to varied per pupils spending across Wales.
- Schools are encouraged to use evidence-informed interventions but rarely do so.
- Schools use PDG for a wide range of interventions, many of which do not directly address learner attainment.
- The eligibility criteria for PDG (e-FSM) means that some learners experiencing poverty do not attract funding.
- Economic evaluations of the cost-effectiveness of PDG have not been undertaken.

Policy and practice implications:

1.15 In this research we will explore and engage with a wide range of policy areas and peer-reviewed evidence. This will provide context to the research findings to answer broader research questions around the targeting and use of PDG. This is a particularly important time for the Welsh education system. The Welsh education system has undergone recent radical changes and system-wide shocks, including the implementation of the new curriculum, responses to the recovery from the global COVID-19 pandemic, and a very challenging economic outlook. Improved precision in the targeting and use of PDG funding would support learners to catch up losses over recent years and would ensure value for money for the Welsh Government.

1.16 This research will support the updated Welsh Government [Programme for Government](#) (GOV.WALES.UK.2021) which has a key focus on tackling the impact

of poverty. This research will support the education minister's [Oral statement](#) given in May 2023 (Senedd Cymru, 2023) and the speech given to the [Bevan Foundation](#) (GOV.WALES.UK, 2022b) where he set out the national mission to re-focus on the poverty related attainment gap to improve outcomes for disadvantaged learners through a focus on:

- High-quality learning and teaching
- Community Focused Schools
- Early childhood education and care
- High aspirations supported by strong relationships
- Health and wellbeing
- Leadership
- Curriculum for Wales and qualifications
- Supporting post-16 progression

Link to academic literature

1.17 The rationale and expected impacts of the PDG are strongly linked to a wider body of academic work and evidence on the impact of school spending on learner outcomes, particularly learners from disadvantaged backgrounds. Up to about 2010, there was little good evidence for a strong, causal relationship between resources and learner outcomes. This is partly because there are numerous sources of potential bias. There can be a positive bias if schools attended by learners from richer backgrounds are able to achieve higher levels of funding (e.g., in countries where schools are funded by property taxes). However, there can be a negative bias if resources are targeted at learners from disadvantaged backgrounds in ways that are not observable to researchers.

1.18 Recent research has sought to address these biases with more credible research designs and has found much greater evidence of positive impacts. Via the use of meta-analysis, Jackson and Mackevicius (2021) find that a \$1000 increase in spending per learner, increases in test scores by 0.035 standard deviations, high school graduation by 1.9 percentage points, and college attendance by over 2.6 percentage points. They further show that capital spending has about half the effect of revenue or day-to-day spending. There is also evidence that the effects of spending are larger for learners from more disadvantaged backgrounds. As part of this meta-analysis, the authors restricted the analysis to studies with credible strategies to estimate causal relationships.

1.19 Whilst much of the best evidence comes from the US, this pattern of results has been confirmed in two UK papers (Gibbons, McNally and Viarengo, 2018)

analyse anomalies' in funding across local authorities to estimate a strong positive relationship between funding and outcomes; Holmlund, McNally and Viarengo (2010) use changes in the political composition of councils to come to similar conclusions). This can also be seen in Norway (Hægeland, Raaum and Salvanes, 2012, make use of the location of waterfalls and their effect on local tax revenues to estimate the effect of funding on outcomes) and the Netherlands (De Haan (2017) make use of sudden changes in disadvantage funding). Also, for the UK, Machin, McNally and Meghir (2010) found that extra resources focused on disadvantaged or low-ability groups through the Excellence in Cities schemes can improve educational outcomes amongst these groups.

1.20 The finding that higher funding leads to better educational outcomes, particularly amongst more disadvantaged learners, has thus been repeated across a range of country contexts. This makes it a highly secure finding.

1.21 The overwhelming conclusion of the new literature on school spending is that there is a substantial positive effect of extra spending, with the effects likely to be larger for pupils from more disadvantaged backgrounds. The main implication is that PDG should have had a positive effect on learner outcomes and helped close the attainment gap. However, it would be hard to find credible evidence of a true impact as, like similar schemes in the rest of the UK, the PDG was introduced on a national level across all schools in Wales at the same time, meaning that there is no comparison or control group. This review seeks to understand whether the right conditions exist in Wales for the PDG to achieve the potential impact implied by the wider international evidence.

Research aims:

1.22 The main aims of this research were to evaluate the use of PDG in Wales and to identify the most effective means of targeting this additional funding so that it achieves the greatest impact on learners in scope.

- The use of the PDG in Wales.
- How similar grants are used in some other countries (England, Scotland, Northern Ireland, and the Republic of Ireland).
- The main indicators schools use to target funds and design interventions.
- How evidence of outcomes is captured and reported.
- How resource allocation and targeting at school-level can be more evidence informed.

2. Methods

2.1 Mixed methods research incorporates both quantitative and qualitative research within one empirical study. Research methods have been selected with respect to the most robust approach to the specific research questions following a *question-to-methods approach* (Owen, Watkins and Hughes, 2022). Employing mixed methods in educational research is particularly useful because it allows researchers to better capture the complexity inherent in educational contexts providing a degree of corroboration and convergence between the data that are gathered, and thus strengthens the robustness of the conclusions (Almalki, 2016; Kelle, 2006), and ensures that the methods selected are most appropriate to the particular research question being asked. Advisory Board was established including key stakeholders within the Welsh education system, the board has provided expert advice.

2.2 This study has used the following data collection tools:

- Rapid review of funding targeted to disadvantaged learners
- A survey with key stakeholders in the education system
- Interview with a sample of key stakeholders

Rapid Evidence Review

2.3 Given the time frame, a rapid evidence review was conducted particularly to address research aim of understanding how Wales and other countries are using funding targeted to disadvantaged learners. A rapid review method is commonly used to inform urgent and high priority decision-making by collating, analysing, and presenting relevant evidence in a streamlined and timely way (Garritty et al., 2021).

The rapid review methodology has seven stages and is outlined in Table 2.1 below.

Table 2.1 Rapid review stages

1)	Develop the research questions that the review seeks to answer, done with key stakeholders, the advisory group, and the research team. Develop the protocol , and the inclusion and exclusion criteria.
2)	Setting the eligibility criteria . Population/Intervention/Comparison/Outcomes (PICO) detailing the limitation of language, timeframe, study design and so on.
3)	Searching the relevant databases. This will include relevant educational research databases and policy/ grey literature.
4)	Study selection, screening title and abstract and then Full-text screening . Using the PICO, titles and abstracts will be screened for eligibility.
5)	Data extraction will begin using a piloted data extraction form. Reliability of extracted data will be cross checked between the research team.
6)	Risk of bias tool will be used for transparency.
7)	The evidence from the rapid review is synthesized narratively . The PRISMA checklist to improve transparency and the PRISMA flow diagram to summarise the screening process.

Rapid review questions

2.4 The rapid review questions were developed by the research team, refinement of the questions was done with the stakeholders. Changes were made to incorporate Republic of Ireland in the scope of the review.

1. What information is currently available to understand how the PDG and other similar and equivalent grants are used across the four nations of the UK and the Republic of Ireland?
2. What indicators do schools, Local Authorities (LA) and regional consortia across the four nations and the Republic of Ireland use to target or design/implement PDG funding interventions?
3. How do schools, LAs and regional consortia in Wales currently report PDG spending, and how does the reporting evidence impact?
4. What other evidence is available regarding learner outcomes and the value for money of the PDG and similar/ equivalent funding?

2.5 The review was registered with **PROSPERO** (registration number: CRD42022370116). Each country had different deprivation funding and schemes, the team decided that we would include the policies from each government (Wales, England, Scotland, Northern Ireland, and Republic of Ireland) as a base for how the policies should work.

Sampling strategy and recruitment of participants

2.6 The sample of participants were identified by the Welsh government in the first instance. The target audience for the survey instrument were Welsh government officials, and individuals that worked for the Local authorities, Regional Education Consortia, Estyn and The National Academy for Educational Leadership. To reach the participants of interest, a nonprobability sampling technique, i.e., convenience sampling, was used to disseminate the survey instrument. The convenience sampling method is used when members of the population that fit set criteria are targeted, and are conveniently available, to participate in empirical research. This method is cost and time efficient and it allows the researcher to contact participants that are easily accessible. Nonetheless, the results generated via this sampling method are not representative of the population as they are not heterogeneous (Etikan, Musa and Alkassim, 2016).

2.7 Based on the job titles of the participants that contributed to this research project, a further sampling method, i.e., a snowball sampling technique, was employed to collect data. Snowball sampling is also a nonprobability sampling technique where the researcher initially starts with a small sample of participants that fit the set criteria of the research who, post contributing to the research, are asked to recruit other potential subjects that might be willing to participate in the study (Parker, Scott and Geddes, 2019). The research team was not authorized to contact schools directly however, it was noted that one headteacher has contributed to this research. Hence, it is asserted that, via the use of snowball sampling, certain participants have shared the survey links to individuals that they considered relevant for this study. The data collected from the headteachers was kept and analysed as it was agreed that headteachers are important stakeholders of the education system and they could bring an important perspective on the use of the PDG.

2.8 The survey was designed and shared using Jisc Online surveys website. Invitation emails that included the survey links were sent out to Local authorities, Regional Education Consortia, Estyn and The National Academy for Educational Leadership, and Welsh government officials outside of the advisory board, but with relevance to PDG. Follow up emails were sent out periodically as well as reminders from Welsh Government. The survey was available in Welsh and English.

2.9 The last item in the survey instrument asked the participants if they would like to participate in a follow-up interview. If they selected 'Yes', they could leave their contact email. The research team would use the contact emails to invite participants to arrange an interview. Interviewees had the choice of participating either online or in person. Also, the participants could choose to be interviewed either Welsh or English. Reminder emails for participating in the interview were sent out periodically.

Participants

2.10 Primarily, participants were focused on the middle tier of the education system, given the pressure on headteachers and other staff working within schools. However, given the sampling strategy there were some headteachers that completed the survey. This could be because they are part of additional organisation or networks where the survey was shared. Participants gave informed consent for both the surveys and interviews, copies of the consent forms can be found in APPENDIX A.

Survey Participants

2.11 The initial sample size consisted of n=37 participants; 95% (n=35) of participants accessed the English version of the survey and 5% (n=2) accessed the survey translated in Welsh. It was noted that 22% (n=8) did not consent to fill in the instrument thus, the overall number of responses used for statistical analysis was n=29. Table 2.2 presents the participants' characteristics and regions the organisations were located; the results indicate that most of the participants worked for more than 21 years in the education system, and they had experience of working in schools in roles such as teaching, leadership, assessments, or monitoring.

2.12 The participants covered all the regions in Wales; higher percentages of participants worked in organisations located in South Central Wales (32%, n=9) and North Wales (21%, n=6). In terms of the county of Wales where the organisations are based, the participants who completed the survey covered most of the counties in Wales. Based on these findings, this sample was considered suitable for this research.

Table 2.2 Respondent characteristics and region the organisation is based

Category	Frequency	%
Number of years worked in the education system		
0 to 5 years	3	11
6 to 10 years	4	15
11 to 15 years	1	4
16 to 20 years	1	4
21 to 25 years	6	22
26 to 30 years	7	26
Over 30 years	5	19
Experience in a school in a teaching/ leadership/ assessment/ monitoring role		
Yes	21	75
No	7	25
Region		
North Wales	6	21
Mid and West Wales	3	11
South West Wales	3	11
South East Wales	5	18
South Central Wales	9	32
All Wales	2	7

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

Interview participants

2.13 In total, 10 in-depth interviews were conducted. Two of the interviews had two participants. In these joint interviews both participants were from the same organisation and had similar roles within that organisation. All the interviews were conducted online and in English. Participants were from a range of organisations. This includes local authorities, regional consortia, and Welsh Government.

Survey

Survey design

2.14 The quantitative survey was developed by the research team, this included open-ended questions for detailed responses as well as closed scaled responses. The open-ended questions were linked to the focus of the Likert scale questions which gave the participants the scope to expand and elaborate on responses. A copy of the survey can be found in APPENDIX B. The survey was designed around themes that have already been identified in the literature. Stakeholders were also able to give feedback on the design of the survey.

Survey piloting

2.15 Initial versions of the survey were reviewed by one member of the regional consortia, one lecturer in School of Educational Sciences and three members of the stakeholders' group within Welsh Government. The piloting allowed us to identify, clarify the wording and terminology. Feedback included concerns over complex concepts (funding systems), clarity and terminology. A revised version of the survey was sent to the stakeholders in Welsh Government and a lecturer in School of Educational Sciences in Bangor University. Copies of the Welsh and English surveys can be found in APPENDIX B.

Interviews

Designing and conducting the interviews

2.16 The interview schedule was closely related to the survey, following the same broad set of themes, to allow for a deeper and richer understanding of participant perceptions and experiences. A review of the PP was conducted by Morris and Dobson (2021), the research team contacted the PI for this research project, and they shared their interview schedule. This supported the research team to look at the types of questions and the terminology. A semi structured interview approach was used to allow for exploration of themes that may not have been included in the interview schedule and gives the participants the time and space to discuss relevant topic within their context. A copy of the interview schedule can be found in APPENDIX C.

Interview Recruitment

2.17 Participants were invited at the end of the survey to participate in an interview. All participants were contacted by email. With an initial low response rate for interviews, a separate interview only email was sent to the relevant organisation to identify further participants.

Data Analysis

Survey data analysis

2.18 The data the survey instrument generated was processed and analysed using IBM SPSS version 27. Descriptive statistics i.e., frequencies, were used to analyse the quantitative data whilst thematic analysis (Braun and Clarke, 2006) was employed to analyse the data generated from the open-ended questions. Intercoder reliability (ICR) was used to check for consistency of theme development and any research bias. The ICR supports trustworthiness through the analysis stage of qualitative research (Kurasaki, 2000). Coding was completed by one of the team and a sample of codes were checked by a second team member the ICR was 95.7% (O'Connor and Joffe, 2020).

Interview data analysis

2.19 All interviews took place online and were video recorded on a secure online platform. Recorded video interviews had the video redacted (to protect participants' identity). And were sent to a private transcription service to be transcribed in an electronic format, ready for analysis. Themes were identified using thematic analysis (Braun and Clarke, 2006) for both interviews and open-ended survey responses.

2.20 The analysis of the qualitative data was conducted by one team member, once familiar with the data began to develop initial codes. We followed a six-step process to develop the final themes; the 6 stages outlined by Braun and Clarke (2006); (1) familiarization/immersion, (2) generating initial codes, (3) generate initial themes, (4) review themes, (5) name and define themes, and (6) produce the report. This will allow themes to emerge from the data and is a flexible method for use in research.

3. Rapid Evidence Review

Rapid review objectives

3.1 The specific research objectives were:

1. How are funding policies focused on socio-economic disadvantage designed across the four nations of the UK and the Republic of Ireland?
2. How is this funding used in practice? Including the indicators that schools, Local Authorities (LA) and regional consortia across Wales use to target and implement funding interventions.
3. How do schools, LAs and consortia in Wales currently report PDG spending, and how does the reporting evidence impact?
4. What other evidence is available regarding the impact of the PDG on learners?

Publications included

3.2 A total of 29 relevant publications were identified for inclusion in this review. Appendix D details the table of characteristics of each included study. The number of publications available for each nation varied from two for Scotland to 11 for the Republic of Ireland (see Table 3.1). One publication included information about funding across the UK and one publication discussed the funding in Northern Ireland and the Republic of Ireland. Appendix E details the screening process.

Table 3.1 Number of included publications by nation.

Nation(s)	Number of included publications
Scotland	2
Wales	3
England	8
Northern Ireland	3
Republic of Ireland	11
Northern Ireland and Republic of Ireland	1
UK	1
Total	29

3.3 Relevant publications from between 2013 to 2022 were included in this review. The publication date of included publications is presented in Table 3.2.

Table 3.2 Publication date of included publications

Publication date	Number of included publications
2013	1
2017	3
2018	7
2019	3
2020	3
2021	8
2022	4
Total	29

3.4 The types of publications included in this review ranged from 21 reports, including government, charity and think tank reports, to seven peer-review articles and one consultation response (Table 3.3).

Table 3.3 Type of included publications

Publication type	Number of included publications
Report (e.g., Government/Charities/ Think tanks)	21
Peer-reviewed article	7
Consultation response	1
Total	29

Results

Funding design

3.5 Funding policies in Wales, England, Northern Ireland, Scotland, and ROI aim to address the attainment gap between non-disadvantaged and disadvantaged learners. There are key differences in the way funding is designed, targeted, and monitored. For this review we followed a policy framework – see Figure 1 – that has been used in Verelst et al. (2020) and in Franck and Nicaise (2022). This framework allows the evaluation of policies that are embedded in the wider education system. Each nation will be discussed separately using the policy framework. Funding per pupil is different across all the countries, Northern Ireland has the lowest spend per pupil, while ROI is designed around area deprivation so per pupil spending is difficult to calculate. Figures are from the current academic year (2022-23) unless stated – see Table 3.4.

Figure 3.1. Conceptual framework used to review the funding policies in the UK and ROI



Source: Verelst et al. (2020)

Research Question 1:

3.6 **How is funding for socio-economic disadvantaged learners allocated across the four nations of the UK and the Republic of Ireland?**

Table 3.4 shows the allocation of funding for Wales, England, Scotland, Northern Ireland academic year 2022-2023, and Republic of Ireland 2021-2022.

Table 3.4 Allocation of funding per pupil in Wales, England, Scotland, Northern Ireland academic year 2022-2023, and Republic of Ireland 2021-2022

Nation	Policy name	Budget	Per pupil Primary	Per pupil Secondary
Wales	Pupil Development Grant (PDG)	£125m (94% to schools/settings)	£1,150	£1,150
England	Pupil Premium (PP)	£2,68bl	£1,385	£985
Scotland	Pupil Equity Fund (PEF)	£147m (97% to schools)	£1,225	£1,225
Northern Ireland ⁶	Targeting Social Need (TSN)	£70m	£613.60- £1227.20	£379.18 - £758.36
Republic of Ireland	Delivering Equality of Opportunity in Schools (DEIS)	€170m ⁶	N/A	

Wales

3.7 Policy objectives: The Pupil Development Grant (PDG) was first implemented in 2012 (previously the Pupil Deprivation Grant) to improve outcomes for pupils from socio-economically disadvantaged backgrounds aged 5 to 15, to help them to reach their full potential. This also includes 3–4 year-olds under the Early Years Pupil Development Grant (EYPDG).

3.8 Policy design: The policy is designed to target individual learners. The indicator used is e-FSM and the majority of funds are given directly to schools.

3.9 Funding allocation: Schools/settings receive £1,150 for each learner aged 5-15 who are e-FSM, reported in the Pupil Level Annual Census (PLASC) of the preceding school year. Early Years PDG is available at the same rate for each eligible learner aged 3 to 4 in nursery education, maintained and non-maintained settings. Most of the PDG grant budget is delegated to schools/ early years settings. Regional consortia (and local authorities where consortia no longer exist) receive additional PDG grant funds to employ PDG advisors and for strategic expenditure.

3.10 LAC Learners: The regional consortia receive £1,150 for each looked after learner (LAC). Funding is allocated annually. LAC funding is managed regionally by the regional consortia/LA.

⁶ This is to cover the package of support to primary and post-primary 2021/22 (Oireachtas, 2022)

3.11 **Implementation:** PDG must be used to support LAC and e-FSM learners, although the grant does not have to be solely tracked to e-FSM. The grant may also be used for whole-school strategies to improve the outcomes for LAC and e-FSM learners. This could include training, tracking systems that would identify needs and evaluate interventions that include e-FSM and LAC learners.

3.12 **Monitoring:** Welsh Government publishes PDG allocations (PLASC data), and schools are responsible for publishing PDG school statements on their own websites. School statements must outline the areas on which the PDG is being spent. There is no need for schools to have a separate plan for PDG, but they should document how they utilise the PDG spending within the school's development plans. Schools are responsible for monitoring interventions to assess the effectiveness and their expected outcomes and use this learning to tailor plans in subsequent years. The latest Welsh Government [Guide to the Pupil Development Grant \(2023\)](#) encourages schools to seek guidance from the [National professional enquiry project](#).

3.13 The regional consortia/LAs support and challenge schools in relation to PDG usage, and Estyn monitor PDG use as part of their inspectorate duties. Regional consortia must provide plans for the PDG funding they receive.

England

3.14 **Policy objectives:** The policy was introduced in 2011 to improve education outcomes for disadvantaged learners in schools aged between 4 and 16 years old, 'Ever 6' (learners who have been entitled to FSM in the last six years), learners who are in or have been in care (LAC), and learners with no recourse to public funds (NRPF).

3.15 **Policy design:** The policy is to target individual learners, the indicator used in England is e-FSM. England has amended the eligibility criteria over time, including Ever-6 and NRPF and has a wider coverage than other countries.

3.16 **Funding allocation:** Pupil premium funding is allocated based on the number of eligible pupils in each school, using e-FSM as the indicator.

3.17 **Implementation:** School leaders can decide on which activity to spend their pupil premium within the framework set out by the Department for Education (DfE). There is a menu of approaches and schools are also encouraged to use the EEF toolkit that provides evidence of effective strategies in raising attainment.

3.18 The menu is designed to help schools use their funding effectively to raise the attainment of disadvantaged learners. The format of the menu reflects evidence suggesting that pupil premium spending is most effective when used across 3 areas:

- High-quality teaching, such as staff professional development

- Targeted academic support, such as tutoring
- Wider strategies to address non-academic barriers to success in schools, such as attendance, behaviour, and social and emotional support

3.19 **LAC learners:** Virtual School heads are responsible for managing the funding given to local authorities for learners in their care. They work with schools to ensure the funding is used to help deliver the outcomes identified in the learner's personal education plan. They can pass all the funding on to schools or retain some to fund activities that will benefit a group of looked-after children.

3.20 **Monitoring:** Schools must publish and update an annual PP strategy statement (using the DfE template) on their website about how they plan to use PP funding in the current academic year and the outcomes / impact of previous spending on the attainment of disadvantaged learners in the previous academic year. Ofsted monitor the PP as part of their inspectorate role, and they highlight effective use of PP on their website.

Northern Ireland

3.21 **Policy objective:** Targeting Social Need (TSN) was introduced in 1998 and is part of a wider set of reforms to tackle disadvantage. The education element of TSN is disseminated through the common funding formula (CFF). CFF is calculated by the Department of Education (DfE) to encompass all the elements of a school's core budget. Northern Ireland has the lowest spend per pupil compared to other countries.

3.22 **Policy design:** TSN is designed to support schools with the additional costs of educating learners from deprived backgrounds, and the challenges associated of educating learners in schools with high proportions of socially deprived learners. The TSN is available to state-maintained schools covering nursery, primary and post primary education. The TSN is the social deprivation element given to schools as part of their core budget.

3.23 **Funding allocation:** Funds for the TSN are distributed directly to schools and the level of funding depends on the stage of schooling and the area where the school is located.

Nursery school or nursery classes:

3.24 To be eligible for the additional funding in nursery, a learner's carer must be in receipt of Job Seekers Allowance, Income Support or Universal Credit (JSA/IS/UC). The learner must be eligible for free school meals.

3.25 The funding is calculated in the first instance by the DfE each year to determine the percentage values, which determines the weighting and cash values. This consists of two values that determine the funding allocation to nursery schools

and nursery classes. When the percentages have been calculated, funding will be allocated to schools using three different bands- information about the calculations used and cash value is provided in Table 3.5.

Table 3.5 Funding allocated to nursery schools or nursery classes based on the three bands

Band	Calculation	Cash value 2022/2023
Band 1:	Baseline, eligible learners (JSA/IS/UC or e-FSM) below the percentage value	£672.54
Band 2:	All eligible learners (JSA/IS/UC or e-FSM) who are above the percentage value up to and including the mid-percentage value	£840.67
Band 3:	All eligible learners above the mid percentage value.	£1,345.08

3.26 **Primary schools:** The DfE collate the number of e-FSM learners from the annual census each year:

1. All learners in primary school settings will be counted and an average percentage will be calculated.
2. Schools with above average percentages of e-FSM – a ‘mid- percentage value’ – will be calculated.

3.27 Following the calculation of the above two percentage calculations, funding is allocated using the three bands where the weightings and cash values will be determined- for further information see Table 3.6.

Table 3.6 Funding allocated to primary schools based on the three bands

Band	Calculation	Cash value 2022/2023
Band 1:	Baseline, eligible learners (e-FMS) below the percentage value	£613.60
Band 2:	All eligible learners(e-FSM) who are above the percentage value up to and including the mid-percentage value	£767.00

Band 3:	All eligible learners above the mid percentage value.	£1227.20
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3.28 **Post primary schools:** The DfE collate the number of learners entitled to free school meals (e-FSM) from the annual census each year. The percentages are calculated in the following ways:

1. All learners in post-primary schools will be counted and an average percentage will be calculated
2. Schools with above average percentages of e-FSM – a ‘mid- percentage value’ – will be calculated.

3.29 Following the calculation of the above two percentage calculations funding is allocated using the three bands where the weightings and cash values will be determined see Table 3.7.

Table 3.7 Funding allocated to post primary schools based on the three bands

Band	Calculation	Cash value 2022/2023
Band 1:	Baseline, eligible learners (e-FMS) below the percentage value	£379.18
Band 2:	All eligible learners(e-FSM) who are above the percentage value up to and including the mid-percentage value	£473.97
Band 3:	All eligible learners above the mid percentage value.	£758.36

3.30 **Implementation:** Schools can set their own priorities based on the needs identified within their setting. The Department of Education have a guide to effective practice, the guide is constructed by using evidence from the TSN Planner from the previous year.

3.31 **Monitoring:** Schools that receive TSN funds are required to account for the use of the funds within their school development plans. The new online system called TSN Planner is based on the reporting requirement in the school development plan. As mentioned above, the Department of Education use this data to collate reports for schools to utilise. Some of the data is linked to outcome measures and some is used in subjective accounts from school leaders.

Scotland

3.32 Policy objective: The Pupil Equity Fund (PEF) is funding that is allocated to schools to close the poverty related attainment gap and to make sure that every child can have the same opportunity regardless of background. The PEF is part of the Scottish Government's 'Scottish Attainment Challenge' (SAC), which is a wider set of policies to challenge the attainment gap that is renewed every four years and aligns with the Parliamentary term. The Scottish Government launched their SAC 2022/23 – 2025/26 in March 2022 with a focus on accelerated progress due to the COVID-19 pandemic. PEF is the element that will be discussed within this analysis.

3.33 Policy design: The PEF funding is allocated to local authorities. The fund is ring-fenced with guidance on how much of the grant is allocated directly to schools. Funds must be utilised on strategies that are additional to core universal provision. The PEF fund policy suggests that although learners are entitled based on e-FSM, the headteacher has autonomy to identify other learners that would benefit from strategies that would close the poverty attainment gap. The PEF is designed on a multi-year basis (4-year cycle), giving schools the ability to plan longer term strategies.

3.34 Funding allocation: Given the 4-years of the funding cycle, calculation for the current funding cycle is based on the Health Living Survey, which details the uptake of free school meals, and the Pupil Census data, and the number of special school learners registered for free school meals.

3.35 The Scottish Government allocate the funding to the local authorities. Each local authority has their own funding formula that is then applied to individual schools. Some local authorities have catalogues of providers for each school to ensure expenditure can be monitored and reported separately from normal per capita funds within the local authority. Schools mostly procure services/ activities through local authorities, allowing local authorities to identify spend on top of the monitoring activities.

3.36 Implementation: The Scottish Government set out national operational guidance for schools to support in the planning, dissemination, and monitoring of the PEF.

3.37 The PEF must provide targeted strategies for learners affected by the poverty related attainment gap. Headteachers must show a clear rationale for the spending and that there is an evidence base regarding learners affected by poverty. While there is autonomy for the headteachers to use the fund that suits the needs of the schools, there is a focus on collaborative working and working with community partners. The Scottish Government have also highlighted five key indicators that could support headteachers in their planning:

- Attainment
- Attendance
- Inclusion
- Engagement

- Participation

3.38 Scotland also require schools to consider the cost of the school day and can utilise PEF allocation on this. In partnership with The Cost of a School Day Programme to ensure learners can have full participation and engage in all the activities in school, regardless of the economic status of their families.

3.39 **Monitoring:** Schools should utilise shared knowledge and relevant stakeholders, and the local authority must agree with the schools' spending plans. Headteachers must develop plans on intended spend, clear evaluation strategies with the intended outcomes, and these are agreed with the local authority.

3.40 Local authorities work very closely with schools to monitor and scrutinise school spending. Some local authorities have designed PEF data collection forms, and this was seen as good practice, as well as having catalogues of programmes that schools can choose from.

Republic of Ireland

3.41 **Policy objective:** Delivering Equality of Opportunities in School (DEIS) was introduced in 2005 by the Department of Education and Skills (DES) and is the only funding disseminated to support disadvantage in the school system. The purpose of DEIS is to ensure that through education, the learners located in communities that are at risk of disadvantage can enjoy better opportunities. There are five policy goals that DEIS aspires to accomplish:

- Robust assessment framework,
- Improve learner outcomes,
- Effective resource utilisation,
- Best practice through co-operative working, and
- Support schools with evaluation, feedback, information, and research.

3.42 **Policy design:** The DEIS Package is designed around additional support for schools who are in areas of social deprivation and are entitled to different levels of support based on concentration of area deprivation and the urban and rural status. The support package includes a School Meal Programme, Access to Planning Supports, Professional Development Service for Teachers (PDST), School Book Grant scheme, Home School Community Liaison Scheme (HSCL), Literacy and Numeracy initiatives, support under the School Completion Programme (SCP), access to Leaving Certificate Applied Programme (LCAP), Lower class size (18:1 in junior schools, 20:1 in vertical schools and 22:1 in senior schools), and an Administrative Principal.

3.43 The DEIS schools are categorised as 'urban' or 'rural' schools. The 'urban' DEIS schools have a further distinction – i.e., Urban Band 1 schools (large population of learners are classified as disadvantaged) or Urban Band 2 schools (smaller population of learners are categorised as disadvantaged). The distinction

between 'urban' DEIS schools only applies for Key Stage 1 and Key Stage 2 schools. The resources are allocated based on the categorisation of the schools see Table 3.8.

Table 3.8 Resources allocated to DEIS schools

Scheme	Band 1 schools	Band 2 schools	Rural schools	Post Primary schools	
DEIS Grant	✓	✓	✓	✓	€14.5m
School Meal Programme	✓	✓	✓	✓	€38.8m
Access to planning supports	✓	✓	✓	✓	
Professional Development Service for Teachers (PDST)	✓	✓	✓	✓	
School book grant scheme	✓	✓	✓	✓	€2.8m
Home school community liaison scheme (HSCL)	✓	✓		✓	€24.9m
Literacy and Numeracy initiatives	✓	✓			€4.4m
Supports under the SCP	✓	✓		✓	€24.76m
Access to Leaving Certificate Applied Programme (LCAP)				✓	
Lower class size (18:1 in junior schools, 20:1 in vertical schools and 22:1 in senior schools)	✓				€49.19m
Administrative Principal	✓	✓			

Source: Department of Education and Skills (2020)

3.44 **Funding allocation and Implementation:**

Within the Republic of Ireland there is a wide range of support aimed at schools based on areas of deprivation, centrally mandated and funded by central government. Where available the cost of the different support packages is highlighted in table 3.8.

3.45 Funding is allocated for each **DEIS grant** for activities and any ancillary costs associated with the activities such as heating and lighting, early and late opening of school building for clubs, etc. There is some autonomy as to how they might use this element of the funding.

3.46 The **School Meals Programme** is funding given for the provision of food services and the funding is delegated from the Department of Social Protection.

3.47 The **Professional Development Service for Teachers (PDST)** is required to prioritise development support for teachers working for schools that are already part of the DEIS programme and targeted support for schools that are newly enrolled in the programme. The PDST is a single support service for professional learning covering a range of areas.

3.48 The **School Book Grant**, in DEIS schools, supports learners with the cost of books needed. This grant is administered by the headteacher.

3.49 The **Home School Community Liaison scheme (HSCL)** is funded by the Educational Welfare Services of TUSLA, the Child and Family Agency. This is a preventive scheme that focuses on at-risk learners by collaborating and creating partnerships between teachers, who are appointed as HSCL Coordinators, the families and the community surrounding the learners.

3.50 DEIS schools in Band 1 and Band 2 receive **Literacy and numeracy initiatives**. The initiatives include Reading Recovery, Maths Recovery, First Steps, Ready Set Go Maths Reading, the Junior Certificate School Programme (JCSP) Literacy strategy and Library Project.

3.51 The **School Completion Programme (SCP)** is an integrated support service that aims to impact positively the young learners' retention in education. The SCP works in partnership with the families, communities, the learners, supporting organisations and voluntary bodies.

3.52 The **lower-class size scheme** – i.e., 18:1 in junior schools, 20:1 in vertical schools and 22:1 in senior schools – applies solely to Band 1 schools; Band 2 and rural schools follow general staffing ratios. The funding of this scheme is used to hire staff members based on the ratios.

3.53 Under the DEIS programme, an **administrative principal** is appointed when a minimum of 116 learners attends Band 1 schools or a minimum of 144 learners attend Band 2 schools. Administrative principals do not have any teaching responsibilities and focus on management duties and strategic planning.

3.54 Monitoring: To monitor the DEIS funding, the schools must create and implement a three-year action plan that specifies their targets and the facilities required to achieve them. The set targets are evaluated and monitored every year and the schools are required to link the use of the funding to the policy objectives. The schools need to keep a record of their funding usage and implementation because the DEIS scheme can inspect the schools at any time. The evaluation is carried out by the Educational Research Centre (ERC)⁷ of the Department of Education and Skills (DES) via the Inspectorate.

3.55 Summary:

All nations have strategies that aim to tackle the attainment gap for disadvantaged learners. Nations allocate funding on one of the following bases:

- Individual learner characteristics: Based on the individual characteristics of each learner (Wales and England).
- School-level: Based in the school characteristics, for example the percentage of learners that are classed as disadvantaged (Northern Ireland & Scotland)
- Geographical area: Funding is targeted to regions or areas that are classed as disadvantaged (Republic of Ireland)

3.56 All the UK nations use eligibility for Free School Meals (e-FSM) as an indicator of socio-economic disadvantage: the Republic of Ireland (ROI) use Global HP Deprivation Index and school data. Funding is allocated on an annual basis to schools in Wales, England, Northern Ireland and the Republic of Ireland, and in Scotland on a four-year cycle. England has the greatest coverage of disadvantage learners. ROI has a strong and consistent evaluative framework built into the design of the policy.

Research question 2:

3.57 What indicators do schools, Local Authorities (LA) and regional consortia across the four nations and the Republic of Ireland use to target or design/implement funding interventions?

Targeting:

3.58 All nations, except the Republic of Ireland, use e-FSM to target disadvantaged learners. Scotland use an average calculation to cover the longer term of the funding period, Northern Ireland also have an average calculation, Wales and England have the most similar way of targeting disadvantage where the information is provided at a school level and there is more autonomy for the schools to utilise the fund. Scotland have more of a partnership model working with the LAs. The LAs in Scotland delegate the funds to schools; there is a structured procurement process for schools.

⁷ Statutory body of the DES under section 54 of the Education Act (Educational Research Centre, 2022)

3.59 The ROI targets the fund in a very different way: funding is allocated on social deprivation of the area using Haase and Pratschke (2016) Index of Deprivation (HP Index) combined with DEIS Primary and Post Primary schools providing data alongside this metric.

Table 3.9 Identification of deprivation measures

Nation	Indicator	Information source	Length of Cycle
Wales	e-FSM	Pupil Level Annual Census (PLASC)	2- year
England	e-FSM	Yearly School census	Yearly
Scotland	Average e-FSM	Department of Education	4-year
Northern Ireland	Average e-FSM split into three categories of allocation	Health Living Survey and Pupil Census data.	Yearly
Republic of Ireland	HP Index and school data.	Department of Education	Yearly

3.60 **School resource utilisation:** Across the UK and the ROI there was some evidence of trends emerging in how the funding is targeted within the education system. While not a comprehensive list, the following were key focus areas for schools:

- Numeracy and Literacy
- Parental engagement and knowledge of family life
- Training and deployment of staff
- Specialist services
- Co-operative working with schools, LAs, regional consortia.
- Improving attendance

Wales

3.61 The evidence from Wales comes from Estyn (2020) thematic report, Pye et al. (2017), and Lyttleton-Smith (2019). The evidence which exists on the use of the PDG in Wales is mainly qualitative (case studies and interviews with teachers) and there is a lack of quantitative data that points to impact gains against local/national benchmarks. Estyn have estimated that around two-thirds of primary and secondary schools make good use of the grant. The data they used to make these judgements was from case studies with limited evidence of impact other than anecdotal (Estyn, 2020). There were seen some promising practice from the studies:

- Focus on literacy and numeracy
- Family engagement
- Early targeting

- Integrating PDG in the school development plan (SDP) including monitoring and evaluating interventions.
- Knowledge of a learner's background and circumstances to identifying needs
- Targeted activities including whole school and small group interventions
- Systems that are focused on outcomes and holistic needs.
- Contributing to improvements in attendance.
- Consortia establishing professional learning communities (PLCs) with themes such as closing the attainment gap
- School leaders pooling PDG to fund members of support staff to work across the region.

3.62 **LAC learners:** The Estyn report of 2020 identified promising practice in relation to LAC learners. This encompassed training for foster carers, school staff and the dedicated LAC staff members in schools. The strongest evidence base of evaluations were ones with rigorous designs – for example individual and small group tutoring interventions were effective in improving the academic skills of LAC learners, these are targeted interventions (Estyn, 2020). Boosting efficiency and cross-working across schools, enhancing links between schools, stakeholders, LAs, social services and foster carers was seen as effective use of LAC PDG. There is very little evidence of measured impact from the LAC PDG and there is poor monitoring and evaluation (Mannay and Lyttleton-Smith, 2019).

England

3.63 Evidence for the PP was drawn from three research articles (Barret, 2018; Morris and Dobson, 2021; Read, Macer and Parfitt, 2020). There was little quantifiable data of effective strategies for PP spending and little detail about impact on learners. Spending was predominately associated with the wider consequences of poverty:

- Focus on literacy and numeracy
- A mix of targeted and school wide activities
- Speech and language
- Parental engagement
- Social and emotional initiatives.

3.64 School used universally targeted to the whole school rather than just focusing on PP learners. Programmes to address disadvantage were hampered by external factors outside their control such as housing and availability of community-based services meaning having to provide the services in school, speech and language therapy would be an example. There is pressure on schools to focus spending on supporting English and maths attainment, and conflicts with support for valuable 'soft skills' and needed to take into consideration intersectionality of poverty and black, Asian and minority ethnic (BAME) (Barret, 2018; Morris and Dobson, 2022).

3.65 **LAC learners:** Evidence is drawn from one research article Read, Macer and Parfitt (2020) and is based on surveys and interviews with relevant staff. There was no clear evidence of impact from the activities discussed, leading to limiting conclusions around effective PP+ spending. The interventions were primarily on a case-by-case basis when considering resource utilisation. The authors identified the following areas of spend for LAC learners in England:

- Specialist support services like speech and language therapy
- Training for stakeholders particularly around emotional needs of the learners
- Additional staff, classroom assistants to support LAC learners
- Virtual School staff and resources
- Bespoke interventions, Equipment and Regional events.

Scotland:

3.66 Evidence was drawn from a report by Education Scotland (2020) and a research article from Thornton (2021). There was little quantifiable data and in Scotland schools must purchase services through the Local Authority and there is a dedicated focus on five key areas in Scotland:

- Improvement in attainment, particularly in literacy and numeracy
- Leadership by all practitioners
- Improvement in children and young people's health and well-being
- Improvement in employability skills positive school-leaver destinations for young people.
- Parental Engagement and Involvement

3.67 Evidence from schools suggests PEF was beneficial in developing the staff skills and knowledge in using data and evaluation. There has been an increase in collaborative working (e.g., collaboration with families and communities, and other schools in their local authority) funded by PEF. Sufficient support is given by the LAs to develop and implement the school plan for the PEF (Thornton, 2021).

3.68 PEF-funded interventions in literacy and numeracy were noted by a significant number of schools as having a positive impact on the attainment of learners experiencing disadvantage. Schools were also able to link data to improved increased engagement with families, improved attendance, increased awareness of poverty-related barriers, reduced costs associated with school, improvements in health and well-being, and increased staff capacity (Education Scotland, 2022).

Northern Ireland

3.69 Evidence is drawn from Smyth et al. (2022), a report on both NI and ROI. Interviewed school leaders considered curriculum materials and equipment for additional educational needs to be one of the three most effective TSN interventions.

Republic of Ireland:

3.70 The ROI have evaluation build into the DEIS finding, this evidence if from nine reports the National Foundation for Education Research (NFER) and one research article. ROI have a very clear focus on the DEIS funding. The DEIS system is built on a package of support for schools in disadvantaged areas. Evidence suggests that the introduction of literacy and numeracy programmes as well as an increased emphasis on planning and target setting in these areas contributed to improved outcomes (Verelst et al., 2019). Small class sizes were seen as particularly beneficial, and there was improvement of low achieving learners in reading and mathematics. School leaders considered an increase of home support and parental involvement to have a positive effect. Learning Support services for low-achieving children, improved attendance, teaching literacy and numeracy across the curriculum etc., as important factors in maintaining and increasing the rate of improvement (Kavanagh, Weir and Moran, 2017). The HSCL scheme had a positive impact on both parental participation and school and their local communities (Weir et al., 2018) demonstrating the effectiveness of this element of the package. Evaluation, outcome measures and timescales are built into the policy and monitored and evaluated to inform future changes of the policy (Hepworth et al., 2021). The ROI DEIS scheme is a good example of clear resource targeting and evaluation frameworks.

3.71 Summary:

Across all the nations, school leaders have the autonomy to identify learners that are disadvantaged and that they are using their local knowledge of the cohort to target strategies (Barret, 2018; Thornton, 2021; Pye et al., 2017; Read, Macer and Parfitt, 2020). While the structure in the Republic of Ireland is different, one report detailed that in Band 1 schools, the lack of autonomy for the schools impacted the support they gave to learners (Verelst et al., 2019).

3.72 The global pandemic has increased the number of learners being eligible for free school meals in the UK by up to a fifth in 2020/21 and these learners would have been learners who required additional support to begin with (Julius and Ghosh, 2022). Whilst it is not in the scope of this review to discuss the global pandemic, as Gorard (2022) suggests, funding is sensitive to the changes in the economy more broadly. The PP in England has been falling in real terms since 2014/15 (Julius and Ghosh, 2022; Sibieta and Jerrim, 2021) but society is having to navigate changes in the economy, benefit systems and austerity measures in all areas of public spending. Given the real term reductions in spending, changes to the benefit system and rising inflation, many argue that funding levels need to be increased to match the negative financial impact of economic factors and the benefit system (Julius and Ghosh, 2022). Fluctuations in funding also create uncertainty, leading to a lack of strategic long-term planning, uncertainty around staffing and not being able to embed strategies – this was evident in Wales and England (Pye et al., 2017; Read, Macer and Parfitt, 2020).

3.73 One other aspect that that was a strong finding in the review, particularly when targeting funds, was the wider consequences of poverty or social-economic deprivation. Nine of the included studies discussed that schools were having to compensate for wider issues than the educational attainment gap, this included lack of services to support learners' needs and wider social welfare. School leaders were having to fund services that were traditionally funded by other public bodies, by providing support for mental health, housing and social services (Barret, 2018) and move the focus from the attainment gap. Schools in disadvantaged areas also face difficulty recruiting and retaining teachers or employing high quality teaching staff (Nelis et al., 2021). Clearer guidance and understanding from policy makers are needed to target the funding (Gorard, 2022).

Research question 3:

3.74 How do schools, LAs and regional education consortia in Wales currently report PDG spending, and how does the reporting evidence impact?

3.75 Reporting and impact of the funding is varied, and across all the included studies there was a consistent theme that the poverty related attainment gap still exists. While reporting does happen there is very little evidence of quantifiable and measured impact particularly to support practice that can be shared within the education system. There is little evidence that the funding has made an impact on key stage 4 outcomes.

Reporting:

3.76 There is little evidence of centrally collated information on the spending of funding. Whilst schools in most nations are accountable for the use of the funding through the different governance structures there is little evidence of this information being used to hold schools accountable within the education system. Better reporting of funding could identify local trends, needs and areas of effective practice. Estyn (2020) did produce a report of effective strategies for disadvantaged learners. This report was examples of case studies identified by the regional consortia, but again there was no tangible and systematic evidence of impacts or interventions. However, there were cases where it was felt that the resource use was not adequately monitored (Mannay and Lyttleton-Smith, 2019) and this was also highlighted in England where the PP does not have sufficient monitoring activities in place (Morris and Dobson, 2021).

3.77 In both Northern Ireland and Scotland, school leaders have a designated form to populate to identify, plan and track funding spend. These have now been converted into online platforms and the data is collated centrally, and reports of best practice and areas of spend are reported back to the education system (Education Scotland, 2022; Donnelly, 2021). The systems in Scotland and Northern Ireland are in their infancy, uptake has been slow in Northern Ireland (Donnelly, 2021) and the

LAs in Scotland use different systems. Nevertheless, there is a move towards collating data centrally to monitor and feed back into the education system where and how resources are used. The data is based within case studies or schools who choose to use the online tool but lacks any quantifiable impact.

3.78 Perhaps the best example of reporting comes from the Republic of Ireland. Since the inception of the DEIS, the programme is continually evaluated by the Educational Research Centre. The evaluation framework considers learner outcomes (both nationally and internationally), attendance, parental engagement, perspectives from staff and learners, and each package of support that the school gets within the DEIS policy. The evaluations of DEIS began in 2007, including the assessment of the implementation of the DEIS programme. Evidence suggests that the impact of the reporting has seen changes to policy - for instance the DEIS 2017 Plan (Department of Education and Skills, 2017) included an improved methodology for including schools in the programme, effective resource allocation and more collaborative working. The DEIS system in ROI demonstrates a centralised commitment to evaluation, reporting and adaptability around the needs of the education system.

3.79 **Impact:** There is little evidence across all the countries that the attainment gap had narrowed pre-pandemic on national scales. Measuring the impact of funding on the attainment gap is difficult for three main reasons. Firstly, attributing impact to one source of funding or grant is difficult without clearly defined measures and evaluation frameworks. Secondly, other initiatives and funding streams seek to address the same issue making attribution complex and multi layered. Lastly, changes in assessments, the benefits system, and poverty measures also make measuring the impact on national exam results difficult (Gorard, 2021)

3.80 **Wales:** There is little evidence from Wales on the closure of the attainment gap, particularly with regards to funding, or evidence of the reporting of the PDG. Two sources of evidence suggest that PDG is making an impact on learners but that the impact was slow and the introduction of PDG did not raise attainment in the way that the policy had hoped for (Mannay and Lyttleton-Smith, 2019; Pye et al., 2017). Estyn (2020) demonstrated with case studies where there was effective use of PDG and suggested that two thirds of schools were using PDG effectively, but limited quantifiable data was presented.

3.81 **England:** Evidence from England comes from publicly available data on learner outcomes and Ofsted inspections and indicates that PP is slow to make any impact on learner outcomes (Barret, 2018). New analysis using different methodologies that focuses on the long-term stable e-FSM learners demonstrates that there are small improvements being made and there is less segregation⁸ of

⁸ Education systems that segregate learners on ability or residential areas inadvertently segregate by socio-economic status and thus can hamper social mobility, the cycle of poverty and the quality of the school environment (Gorard, 2021).

learners (Gorard Siddiqui and See, 2021; Gorard, 2022) meaning that e-FSM are dispersed more evenly throughout the settings and not concentrated in a few schools. There is evidence to suggest that measurement issues hamper any ability to evidence the impact of PP and that changes in relation to the economy, e-FSM status, the benefits system and assessment need to be considered before changes to policy are made (Gorard, 2022).

3.82 Scotland: Within Scotland there was some evidence from surveys and interviews that the PEF has been making some impact for disadvantaged learners. Literacy and numeracy interventions were seen as having an impact on attainment for e-FSM learners. There was also some suggestion that schools were able to link data to increased engagement with families, improved attainment, increased awareness of poverty-related barriers, reduced costs associated with school, improvements in health and well-being, and increased staff capacity (Education Scotland, 2022). There was also some evidence that where the PEF was effective it encompassed the following areas:

- understanding the challenges faced by learners and families affected by poverty
- promoting collaborative working
- measuring the progress and impact of embedded approaches
- maintaining communication with parents and learners and an emphasis on the mental health and wellbeing of learners.

However, there is limited quantifiable evidence the strategies improved the attainment of learners.

3.83 Northern Ireland: On international scales NI have good outcomes at primary levels: reading is above the average in PIRLS and TIMSS. But PISA results demonstrate that at 15 years old learners' reading and maths is within the OECD average with scores reducing over the last two cycles i.e., PISA 2015 and 2018 cycles (Gilleece et al., 2020). For SES status there is evidence that NI learners can overcome the effects of socio-economic disadvantage better than some countries, but there are still large gaps in attainment (Salisbury, 2013). There has been some progress in closing the attainment gap. However, the gap does increase between e-FSM and non-e-FSM learners as children progress through school. The attainment gap is usually measured from the outcomes of attaining five or more General Certificates of Secondary Education (GCSEs) – here including Maths and English. This has not changed significantly even though there is evidence of good outcomes in the primary sector on international scales.

3.84 In a survey, school leaders in NI thought there were three main areas of improvement since the introduction of TSN: Learner confidence, attainment and behaviour have improved for learners in Northern Ireland (Donnelly, 2021), but no

quantifiable data was presented. There is a retention issues with learners in secondary stage education in Northern Ireland, and there is a particular low expectation for working class males. The school segregation system also creates inequalities in the system (Smyth et al., 2022).

3.85 Republic of Ireland: The introduction of the DEIS scheme has contributed to the reduction of the attainment gap. However, the progress has been small (Fleming and Harford, 2021). Internationally, reading outcomes on PISA indicate that ROI score high for reading and above the OECD average, and this is attributed to the strong focus on literacy and numeracy in the DEIS package. Reduction of the attainment gap (10.8 % in Band 1 Schools and 8% in Band 2 schools) at secondary level has been observed (Kavanagh, Weir and Moran 2017). Other indicators of the effectiveness of the DEIS programme are attendance and parental engagement (Hepworth et al., 2021) which yield positive results in DEIS schools against clear and quantifiable measures within the evaluation framework.

3.86 One of the key indicators of the DEIS programme is class size, and analysis suggests that DEIS classes in the junior cycle are consistently smaller than non DEIS schools. Retention gaps remain in the senior cycle⁹ - 82.3% and 93.2% for DEIS and non-DEIS schools respectively (Weir and Kavanagh, 2018). The Home School Community Liaison workers are managing to accomplish the aims of the DEIS programme for the learners and their families who attend DEIS schools (Gilleece et al., 2020). There remains an attainment gap between DEIS and non DEIS schools with poverty still being the largest factor in educational underachievement (Weir and Kavanagh, 2018).

3.87 There is evidence that the attainment gains are slowing down and there still remains a consistent gap between Band 1 and Band 2 schools (Hepworth et al., 2021; Kavanagh, Weir and Moran, 2017; Fleming and Harford, 2021). DEIS schools are focused on area deprivation, and this can lead to school segregation (Verelst et al., 2019). DEIS schools are failing to attract high quality teachers, and this could further impact the effectiveness of the DEIS programme. The DEIS has been monitored and evaluated since its introduction; these monitoring activities support the continued changes and adjustments to the programme (Department of Education and Skills, 2022).

3.88 Summary: Overall, there is little evidence of effective resource usage in relation to funding (Read, Macer and Parfitt, 2020; Salisbury, 2013; Gorard, 2022; Donnelly, 2021). Meaning little quantifiable evidence of effective use of funding to tackle the impact of disadvantage. Although there is guidance from the Welsh Government on the use of funding (e.g., EEF toolkit), schools are not using evidence-informed practice consistently (Gorard, 2022; Pegram, Watkins, Hoerger, and Hughes, 2022). Estyn (2020) suggest that two thirds of schools in their small

⁹ Senior cycle in ROI is learners 15-18 years old, while this is non-compulsory most learners enter into senior cycle. Within ROI dropout rates are higher for learners from disadvantage areas.

sample of case studies are using the PDG effectively and there is variance in the outcome data. One important aspect to consider are the measurement issues. Gorard (2022) suggests that there is no true evaluation of funding in England and the measurement tools are not able to capture the full complexity of e-FSM status. The e-FSM status is not a stable category as it is influenced by changes in the economy, region and the length of time that learners are in e-FSM status. According to Gorard (2021), other factors that make measuring the impact on national exam results difficult are changes in assessments, the benefits system, and poverty measures. Caution should be made when policy makers are only focusing on outcome data between e-FSM and non-e-FSM learners as there are not homogeneous groups and the indicator is not stable for all learners. Gorard, Siddiqui and See (2021) warn that any changes to funding need to be based on appropriate analysis.

Research question 4:

3.89 What other evidence is available regarding learner outcomes and the value for money of the PDG and similar/ equivalent funding?

3.90 None of the included studies had an economic evaluation conducted on funding. Without a robust economic evaluation, there is little evidence of cost-effectiveness within funding. Robust economic evaluation requires the intervention to be well-defined and its implementation well-documented to enable an effective assessment of impact. Currently there is no national-level, centrally collated information on how the PDG is spent by schools. In the case of this funding, it would be difficult to conceptualise the activities (what schools are actually doing) and the outcomes (what to measure). While nationally available data, for example GCSEs, might be one outcome that could be measured in relation to e-FSM status, as Gorard, Siddiqui and See (2021) suggest this is not a stable measure. Perhaps the DEIS evaluations offer the best chance to consider an economic evaluation given the clear outcomes measures (attainment, attendance, parental engagement) and evaluation cycles (Weir and Kavanagh, 2018).

3.91 Although there is some tentative evidence that funding is making some difference to learners, on national measures DEIS is improving outcomes for learners in DEIS schools compared to non DEIS schools (Kavanagh and Weir, 2018). In England, there is evidence of small improvements for long-term disadvantaged learners (Gorard, Siddiqui and See, 2021) in relation to segregation, meaning learners are less segregated to particular schools. Other research suggests that there are improvements to learners in Scotland and Wales (Thornton, 2021; Pye et al., 2017).

3.92 There is clearly a lack of transparency and monitoring (Smyth et al., 2022; Donnelly, 2021; Pye et al., 2017) with the utilisation of the PDG funding. This was also evided with other types of funding given to schools within their core

delegated budgets for supporting disadvantaged learners Sibieta and Jerrim (2021). In Wales and Scotland, this is not so simple to calculate, or track given the different delegated budgets for each Local Authority (Sibieta and Jerrim, 2021).

3.93 There is also little evidence of what LAs in Wales utilise their social-economic disadvantage funding for (Pye et al., 2017), either as part of funds delegated to schools or as part of their central services (all separate from the PDG). The regional consortia should also be accountable for the funding they receive to support disadvantaged learners, particularly for LAC learners where they are disseminating the funding directly (Pye et al., 2017). Without knowing what is going in to support disadvantaged learners from all other policies or finance streams, attributing impact of funding (PDG, PP, PEF) is always going to be complex. Equally, without knowing or having reports/sight of what that funding is spent on, tracking and attributing impact is impossible.

Summary of Rapid Review findings:

3.94 Across the UK and the Republic of Ireland, funding can be categorised into three levels of targeting: Individual learners using e-FSM, school targeting using e-FSM, and area targeting using wider measures of deprivation. While there is some evidence of effectiveness of strategies to support disadvantaged learners, there is very little quantifiable evidence in relation to reduction in the attainment gap. England has the greatest coverage as they include 'Ever 6'.

3.95 There remains a need to improve the targeting, use/ implementation, and monitoring of outcomes of PDG funding. One of the fundamental problems with the grant is the lack of robust monitoring activities. Without this information, practitioners, school leaders, and policy makers cannot fully understand any impact being made. Policy makers also cannot adjust or make changes to funding based on evidence-informed decision-making (Franck and Nicaise 2022; Gorard, 2022; Pegram, Watkins, Hoerger, and Hughes, 2022). Fluctuations in funding create uncertainty, leading to a lack of long-term planning and activities. This was evident in Wales and England (Pye et al., 2017; Read, Macer and Parfitt, 2020). Schools need the time to embed strategies and plan longer term improvements, particularly with regards to staff and investments in infrastructure or equipment. Having longer term funding arrangements in schools can reduce impulsive decisions that can be ineffective and be a waste of resource (Read, Macer and Parfitt, 2020).

3.96 Within the included studies, there are some examples of good practice and schools focusing on similar issues. A strong focus on literacy and numeracy, parental engagement, attendance, clear planning with stated targets, and a comprehensive evaluation framework. While, training, employing specialist services, co-operative working with schools, LAs, regional consortia were identified as areas of spend.

3.97 Whilst PDG is intended to improve pupil attainment and close the attainment gap, schools should use this type of funding for interventions that more broadly

respond to the increasing socio-economic disadvantage that pupils and their communities are facing (Craske, 2018). PDG enables schools to use the funding to support areas such as community focused schools, the health and wellbeing of pupils and strategies to raise their aspirations and provide them with support. According to Egan (2016) education alone cannot overcome the impact of poverty. Schools in socio-economic disadvantaged areas also face significant difficulties in the recruitment and retention of teachers. It would seem appropriate, therefore, in future for PDG to make more allowance for spending in those areas which influence but do not necessarily directly impact on attainment.

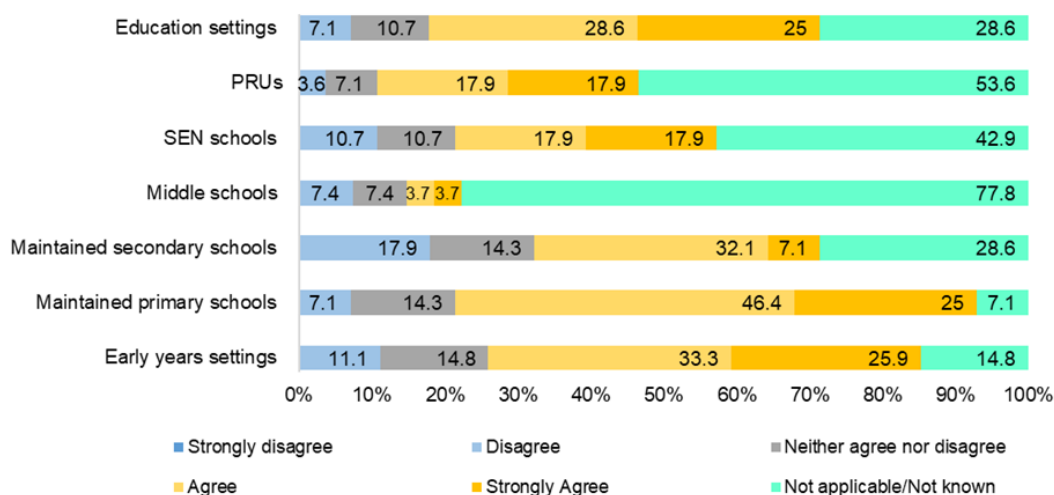
4. Survey findings

4.1 This section presents the quantitative and qualitative results generated from the survey instrument targeted at stakeholders in the education system in Wales. The overall number of responses used to conduct descriptive statistical analysis was n=29. Participants were from all across Wales and represented Welsh Government, regional consortia, local authorities and Estyn.

Targeting of the PDG grant

4.2 The first question centred on the effectiveness of targeting the PDG to learners in different setting of the education system. The results show (Figure 4.1) that respondents believe that the PDG is effectively targeted in maintained primary schools with 46% (n=13) respondents agreeing, and 25% (n=7) strongly agreeing with the statement. In contrast, 7.1% (n=2) disagreed and 14.3% (n=4) neither agreed or disagreed with this statement; 7.1% (n=2) chose 'Not applicable/Not known as their answer. Subsequently, most respondents also considered that PDG is effectively targeted in early years settings as 33% (n=9) agreed and 26% (n=7) strongly agreed with the statement. Figure 4.1 suggests that this sample of participants had no knowledge with regards to targeting PDG funding in middle schools' settings because most of the participants i.e., 78% (n=21), selected 'Not applicable/Not known' as their answer.

Figure 4.1 Targeting PDG to support disadvantaged learners in different education settings



4.3 The *open-ended question* was: **Please provide any additional comments on the targeting of PDG**, survey responses for this section produced 13 responses, three themes developed from the responses.

4.4 Theme 1: Learners missing out

The first theme was around targeting the grant and learners missing out on support. This was because of the way the grant is targeted in some sectors of education:

“Feel that there is not enough strategic thinking in secondary schools and funding is targeted too much at examination classes rather than addressing pupils in Key Stage 3 or earlier.” (Participant 16)

“A particular concern was that schools did not use the funding to focus specifically enough on the needs of disadvantaged learners. The additional support schools provided using the PDG often involved disadvantaged learners but was more focused on low achieving pupils generally which meant that disadvantaged learners who were achieving reasonably well but not to the level of their potential did not receive the attention and support they needed.” (Participant 26)

4.5 Whereas there was a wider consensus that the proxy measure of e-FSM failed to capture all socio-economically disadvantage learners, this was particularly pronounced in early years settings, but was also discussed more broadly.

“With regard to targeting support for the EYPDG. Identification of 3- and 4-year-olds eligible for free school meals (the current indicator) is not possible.” (Participant 22)

“Implementing the grant to specific pupils has always been problematic.” (Participant 9)

4.6 **Theme 2: Monitoring**

One participant suggested that there was good monitoring in place with clear guidance from regional consortia. However, seven participants stated that there was a lack of monitoring. Because there was a lack of monitoring, PDG was not always being used for the intended purpose, there was lack of strategic planning, problematic timing of the grant cycle, and a difficulty attributing spending to outcomes.

“[...] the allocation of the money can become a paper exercise as opposed to an accurate way of recording what has been done for the individual pupils.” (Participant 1)

“[S]chools often use the money to support general budgets and that funding is not necessarily targeted on disadvantaged learners [...] sense that the knowledge of early years settings on how support is provided can be sketchy depending on the approach of individual local authorities.” (Participant 25)

“[...] it is difficult to establish the effectiveness of targeted support in early years [settings].” (Participant 22)

4.7 **Theme 3: Future needs**

Participants were able to contextualise socio-economic disadvantage in a wider context. Policy changes, particularly Universal Credit and the introduction of

universal free school meals, may create unintended consequences for the implementation of the PDG grant. The wider needs in the system mean that schools are having to fund a wide range of interventions and the eligibility criteria are potentially being undermined:

“PDG is currently allocated to those qualifying for eFSM. I have concerns that the eFSM data set is being undermined by the introduction of transitional protection and Universal Credit and there are schools not receiving funding to support vulnerable learners. Also, the changes introduced by the roll out of universal free school meals will mean the data set in primary is further undermined.” (Participant 7)

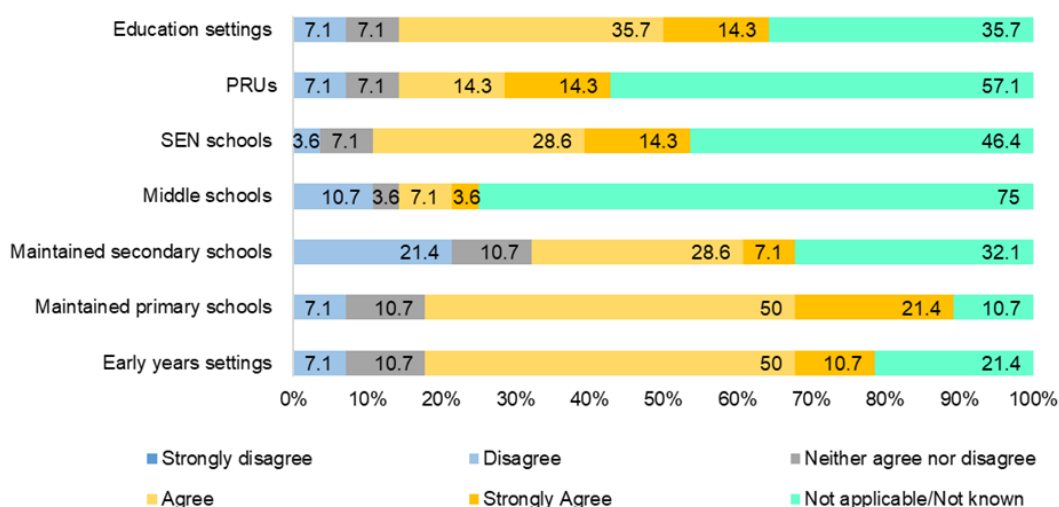
“There needs to be a wraparound approach to the pupils to ensure that they are not just dependent on PDG monies as a way of ensuring success.” (Participant 1)

4.8 **Summary:** Overall, the survey findings suggest that stakeholders consider that PDG is not always well targeted, that monitoring is limited, eligibility is problematic, and schools use the funding for a wide range of purposes.

Effectiveness of implementing provision funded by PDG

4.9 This question centres on the effectiveness of implementation that is funded by PDG (e.g., employment of teaching assistants, literacy programmes, well-being activities, etc.). The results indicate (Figure 4.2) that the majority of the respondents believe that the provision funded by the PDG is effectively implemented in Maintained primary schools and in early years settings. In the prior case, 50% (n=14) agreed and 21% (n=6) strongly agreed whilst in the latter case, 50% (n=14) agreed and 11 (n=3) strongly agreed with the statements. Comparable to the findings in Figure 4.1, most of the participants had no knowledge related to the effectiveness of implementing provision funded by the PDG in middle schools; for this statement 75% (n=21) of the sample choose ‘Not applicable/Not known’ as their answer.

Figure 4.2 Effectiveness of implementing provision funded by PDG (e.g., employment of teaching assistance, literacy programmes, well-being activities, etc.)



4.10 The open-ended question was, **please provide any additional comments on the implementation of provision funded by PDG**. There was a total of nine responses and two themes developed from the responses.

4.11 Theme 1: Effective practice

The first theme was around evidence of effective practice. Whilst the responses indicated that there is effective practice, the open-ended responses did not provide any supportive evidence. Three participants were able to see that there were examples of schools using the PDG grant effectively. There was also the consensus from two participants that there needs to be some more guidance available to school. For example, one participant suggested that:

“[...] schools are increasingly asking for guidance on eligibility of PDG spends.” (Participant 15)

4.12 Theme 2: Lack of long-term planning

The second theme centred around the difficulties that schools face when implementing provision and planning for long-term interventions. There were issues raised about the financial planning of the grant, particularly not having time to embed practice due to the allocation of the grant.

“Settings and schools work hard to make best use of grant funding within the current terms and conditions. However, they know that grant funding is time limited, and it can be more challenging to embed implementations and bring about continued change.” (Participant 8)

“Due to the funding being annual grant based it is difficult to plan consistently and offer continuation of good practice.” (Participant 9)

“Different local authorities adopt different approaches for supporting funded non-maintained nursery settings delivering nursery education and settings not always aware they are receiving EYPDG funding. For example, a local authority may provide training but not explicitly identify the funding is from EYPDG.” (Participant 22)

4.13 One participant pointed out that this situation led to a lack of planning leading to the funding being reactive rather than preventative.

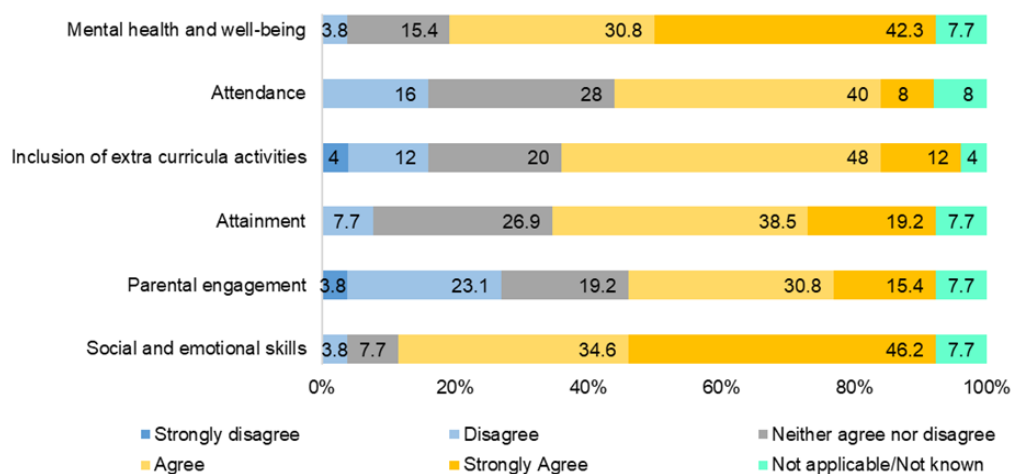
“[...] leaders will target disproportionate amounts of funding at exam years instead of addressing problems in a preventative way.” (Participant 25)

4.14 **Summary:** Whilst respondents claimed that the funding was being effectively implemented, they did not provide supportive evidence. Respondents believe that the administration of the grant terms and conditions leads to a lack of forward planning and long-term preventative interventions.

Impact of strategies

4.15 This question focuses on the impact of strategies funded by PDG, which seek to remove the additional barriers that learners may face. The results in Figure 4.3 suggest that respondents believe that the current PDG funded strategies have the greatest positive impact on the social and emotional skills, the mental health and well-being of disadvantaged learners, and attainment. Specifically, most of the participants in this sample agreed (i.e., 35%, n=9) and strongly agreed (i.e., 46%, n=12) that PDG funded strategies positively affects the social and emotional skills. Next, 31% (n=8) of participants agreed and 42% (n=11) strongly agreed that the strategies implement via the PDG have a positive impact on the mental health and well-being of disadvantaged learners. Lastly, more than a half of the sample agreed (n=10, 39%) or strongly agreed (n=5, 19%) that PDG funded strategies have a positive impact on attainment.

Figure 4.3 Additional barriers that are positively impacted by the current PDG funded strategies



4.16 Open ended question: **Please provide any additional comments on the impact of strategies or provision funded by PDG:** There was a total of eight responses, and two themes developed.

4.17 Theme 1: Changes in the focus

The first theme was around that there was a change of focus in the system, the use of the grant has become less focused on attainment and more towards the additional barriers. Social and emotional skills and mental health has been a focus, particularly post pandemic.

“Direction of spend towards social and emotional and mental health has increased post-pandemic.” (Participant 19)

“Due to the change in accountability measures, there is less of a focus on attainment of PDG pupils now compared to a few years ago.” (Participant 16)

4.18 Theme 2: Difficulty monitoring impact

The second theme discussed by 3 participants was around the difficulty of monitoring and assessing impact of strategies that are delivered by the grant.

“I think it's reasonable to assume that support directed at these areas will have a positive benefit for most recipients of funding support, but the question is to what degree and whether it effectively removes the inequalities for more disadvantaged learners.” (Participant 25)

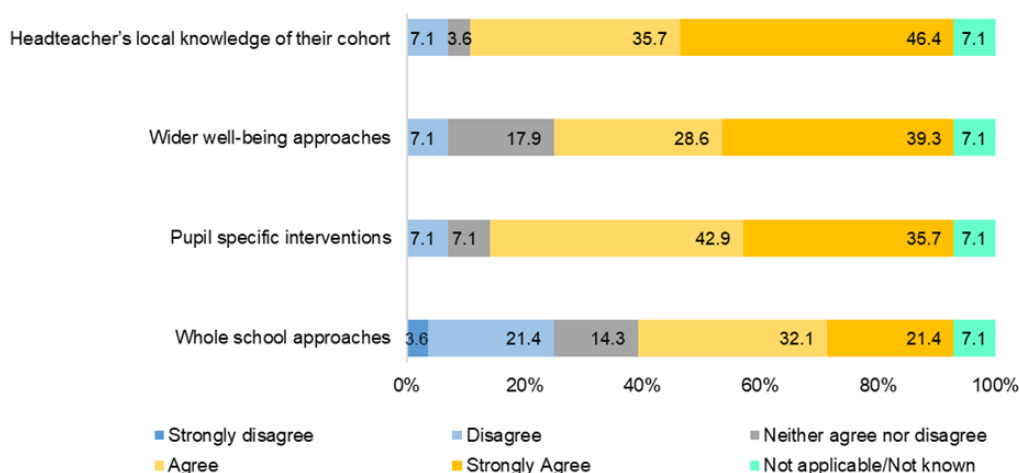
4.19 **Summary:** With the grant being available to schools for over a decade, there has been an evolution in the ways that the grant has been targeted, from the core purpose of supporting attainment. The grant as it is now also focused on the complex barriers learners may face. However, respondents suggest that this has

meant that there is increased difficulty in monitoring outcomes, indicating a need for more support for schools in evaluating and monitoring outcomes not focused specifically on attainment.

Focus of approaches

4.20 This question focuses on which approaches the respondents thought PDG funding should be used for. The use of headteacher’s local knowledge of their cohort as a basis to focus approaches, and pupil-specific interventions are considered the approaches that make the most effective use of the PDG resources (Figure 4.4). Precisely, 36% (n=10) agreed and 46% (n=13) strongly agreed that PDG funding should be based on headteacher’s knowledge of their cohort. Next, 43% (n=12) agreed and 36% (n=10) strongly agreed that PDG funding should only focus on pupil specific interventions i.e., learners who receive free school meals.

Figure 4.4 Approaches on which the PDG funding should be focused



4.21 The open-ended question was: **Please provide any additional comments on the focus of PDG provision.** A total of 10 participants have answered this question. The responses were used to develop three themes.

4.22 Theme 1: Staff understanding the needs of the cohort

Half of the responses were centred around the school’s own knowledge of the cohort. The headteachers/ staff were better placed to understand the needs in the cohort and the community to effectively target and support socio-economically disadvantaged learners.

“Local knowledge known by all staff is key to effective use of PDG in each school / area.” (Participant 15)

“[...] more emphasis should be placed/continue to be placed on the school's knowledge of their cohort.” (Participant 8)

4.23 While there should be a commitment for leaders to have a focus on the knowledge of the cohort, so they are able to understand the needs in their school.

“Headteachers should be expected to engage and invest in local knowledge of their cohort as part of headteachers brief.” (Participant 10)

4.24 **Theme 2: Wider involvement of the community.**

Two participants discussed the need for a more joined up approach to supporting learners from disadvantaged backgrounds.

“Same again, complex, multi-faceted and often needs engagement from other agencies. HT only know what they know and there should be much more cross agency working - including health.” (Participant 1)

4.25 **Theme 3: Targeted approach**

Three participants expressed that if the grant is not targeted to disadvantaged learners, then improvements will not be made.

“Unless funding is properly targeted on disadvantaged learners it will never achieve the purpose for which it was designed - removing inequalities - though it's hard to argue with the idea that all children should benefit and that might not require support would be discriminating.” (Participant 25)

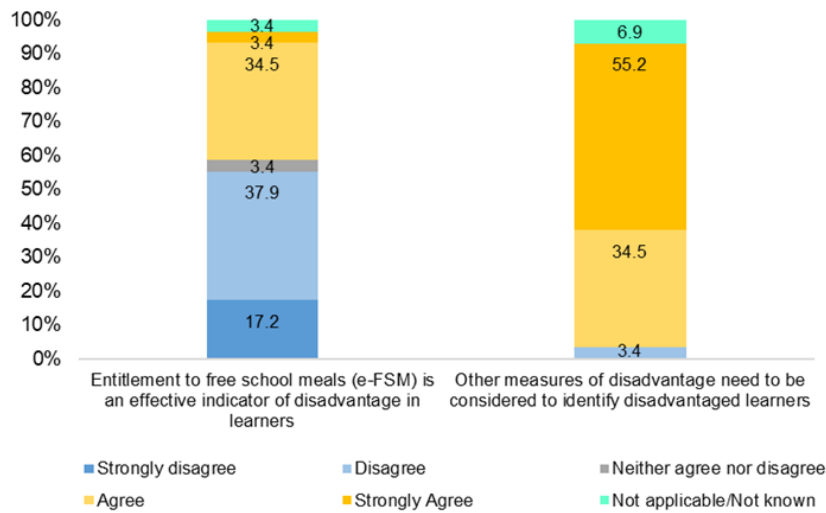
“If the aim is close or narrow an attainment 'gap' then a targeted approach is needed.” (Participant 22)

4.26 **Summary:** The consensus is schools understand their learners best and understand the needs in the school. However, this may lead to the grant being used in ways that were not intended. There needs to be clarification on what the grant can be used for.

Effectiveness of e-FSM as a measure of disadvantage

4.27 This question was focused on the measure of e-FSM as a proxy measure of disadvantage or if other measures need to be identified. The findings suggest that 38% (n=11) disagreed and 17% (n=5) strongly disagreed that the e-FSM is an effective indicator of disadvantage for learners (Figure 4.5). This is reinforced by the fact that most of the participants consider that other measures to identify disadvantaged learners should be employed. The results show that 35% (n=10) of respondents agreed and 55% (n=16) strongly agreed with this statement.

Figure 4.5 Effectiveness of eligibility for free school meals as a proxy measure of disadvantage



4.29 The open-ended question was: **What other indicators do you think could be / need to be considered to help identify disadvantaged learners.** Overall, of 16 participants responded to this question. The responses were used to develop two main themes.

4.30 Theme 1: Wider than socio-economic status

There was a strong opinion that disadvantage is more than socio-economic status alone. A total of 9 participants discussed that e-FSM was not appropriate to define disadvantage. While 6 participants suggested that e-FSM does not cover the learners the grant is intended to support. Again, participants noted that headteachers can identify the learners in need, but that poverty is a complex issue to define with one measure. Changes to the Universal Credit and the roll out of universal free school meals causes issues leading to learners missing out and parents/guardians not claiming PDG.

“We need to decide what we mean by disadvantage- Economic? Social? Many children in some of the most affluent areas can be disadvantaged due to long working hours of parents, no social/family networks, etc., etc. as well as the obvious ones around poverty. This is discussed too narrowly and from my own experience across a variety of catchment areas there is disadvantage in all schools, and we should be looking at the needs of the children in a broader sense alongside the obvious basic needs of food and shelter.”

(Participant 1)

“The biggest risk are the learners who come from households that are above the eFSM threshold but still don't have a spare income. Also, other families do overtime etc to earn extra but are therefore not as present in their children's lives to support them. Other issues include lack of emotional support from parents/carers which isn't always linked to finances often the opposite e.g.,

both parents have careers. Other indicators include access to extracurricular opportunities. Another factor is the numeracy and literacy ability of parents/carers which limits their ability to support their own children.”
(Participant 10)

4.31 **Theme 2: Universal free school meals undermining the primary data set**

Participants noted concern over the unintended consequences that the provision of free school meals in primary schools will have.

“Given the roll out of Universal Primary Free School Meals, the link between PDG and FSM will be less as fewer families will apply for FSM regardless of Welsh Government and Local Authority efforts to publicise. To ensure PDG is targeted at the where it is needed, another measure may need to be considered.” (Participant 21)

“In primary schools, universal free school meals are being phased in so e-FSM will no longer be a suitable indicator as it covers all pupils.” (Participant 26)

“Local knowledge by leaders and staff of family situations. Consideration needed by WG around meaning of disadvantaged. How will the impact of free school meals for all be measured over time? Would these funds be better deployed in supporting deprivation?” (Participant 15)

4.32 **Summary:** In the view of the respondent’s eligibility for free school meals as a proxy measure for disadvantage does not incorporate the complexity of socio-economic disadvantage and they believe there are learners whose families are living in poverty but are not entitled to e-FSM. Changes in national policy around universal free school meals in primary schools will further undermine this proxy. However, there were no suggestions to an alternative.

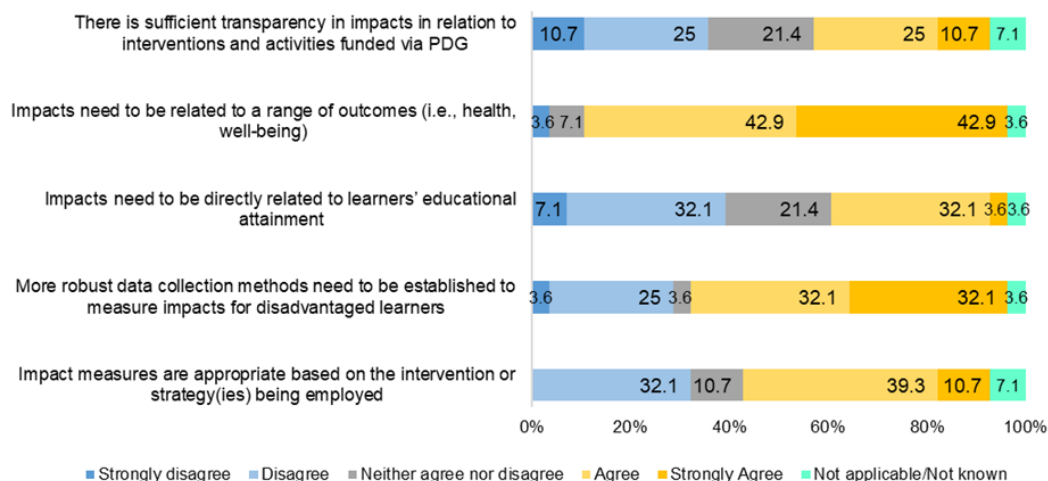
Impact measures

4.33 This question focuses on impact measures, their transparency and if there need to be more robust measurement approaches. The results in Figure 4.6 demonstrate that most participants in the sample thought that the impact measures should be related to a range of outcomes, (i.e. health, well-being) as 43% (n=12) selected ‘Agree’ and 43% (n=12) selected ‘Strongly agree’ as their answer. Yet, 4% (n=1) strongly disagreed and 7% (n=2) neither agreed nor disagreed with this statement; 4% (n=1) chose ‘Not applicable/Not known’. Furthermore, 32% (n=9) agreed and 32% (n=9) strongly agreed that more robust data collection methods should be established to measure the impacts for disadvantaged learners. On the converse, 4% (n=1) participants selected ‘Strongly disagree’, 25% (n=7) selected ‘Disagree’, 4% (n=1) chose ‘Neither agree nor disagree’ and 4% (n=1) selected ‘Not applicable/Not known’ as their answer.

The findings also show that 39% (n=11) participants agreed and 11% (n=3) strongly agreed that the impact measures are suitable based on the intervention or strategy(ies) being employed. Contrarily, 32% (n=9) participants disagreed and 11%

(n=3) neither agreed nor disagreed; 7% (n=2) selected 'Not applicable/Not known' as their answer.

Figure 4.6 Current impact measures used for assessing the impact of PDG funded support and provision in educational settings



4.34 The open-ended question was: **Please provide any additional comments on the impact measures for PDG funded strategies or provision.** A total of 7 responses were given for this open-ended question. Based on the responses, two themes were developed.

4.35 Theme 1: Difficulty in measuring impact.

Three of the participants indicated that it was challenging to measure impact with little information on where the spend is targeted. Two participants discussed that measuring impact from one funding stream like PDG would be difficult as impact could be attributed to other funding.

“Where schools do not robustly monitor the use of PDG, pupils who are eligible for free school meals do not make sufficient progress.” (Participant 26)

“PDG funding alone does not lead to improved educational outcomes for learners. It is additional funding (specifically linked to the level of need) that complements /augments other school provision. Demonstrating impact on outcomes from one grant stream is challenging. We do not need to move to a system that adds more measurements at grant level for schools.” (Participant 8)

4.36 Theme 2: Guidance

Overall participants thought there needed to be better guidance for practitioners about intended impacts on disadvantaged learners. Disadvantaged learners are not a homogeneous group, there needs to be an understanding of what impact is for the individual learners. To evaluate impact there needs to be an understanding of basic provision looks like for all learners before impact can be assessed. Guidance from

the Welsh government around effective practice with PDG was needed to support schools not only to measure impact but to implement the grant effectively.

“In line with my previously comments this should be looked at in a broader sense and should be given time to get it right. There should be a basic understanding of what an equal entitlement looks like and we should fund all children to this level as a starting point. Equality can lead to equity but unless we know what the basic entitlement looks like and costs how can we measure success?” (Participant 1)

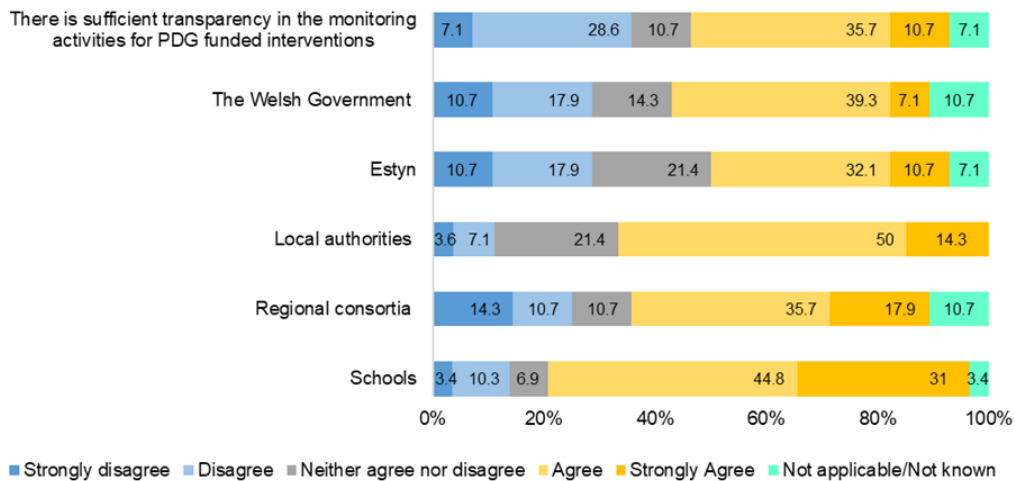
“The effectiveness of measuring impact varies from school to school. It also depends on how the spend has been allocated. It would be useful for WG to share effective use of PDG across schools in Wales and how they have been measured for impact.” (Participant 15)

4.37 Summary: Respondents believe that measuring impact is a complex issue and attributing impact to one funding stream is not possible due to the other funding being used by schools. They argue that while there are good examples of the grant being used, it will always be difficult to attribute the impact to PDG alone. Baselines need to be established if the impact of the PDG is to be evaluated. There needs to be more information in the education system as to what constitutes effective practice for socio-economically disadvantaged learners.

Monitoring activities

4.38 This question focuses on the monitoring responsibilities in the different levels of the education system. Based on the findings in Figure 4.7, schools are the most efficient in monitoring PDG spending activities; 45% (n=12) agreed and 31% (n=9) strongly agreed with the statement. They are followed by local authorities in effectiveness with 50% (n=14) agreeing and 14% (n=4) strongly agreeing with the statement.

Figure 4.7 The sectors of education system that monitor the PDG spending effectively



4.39 The open-ended question was: **Please provide any additional comments on monitoring the PDG spending activities.** The 8 responses led to the development of three themes.

4.40 Theme 1: Monitoring issues

Respondents suggested that spending patterns were difficult to monitor, at a school-level. They believe that given that socio-economic disadvantaged learners are not a homogeneous group, there is difficulty when learners have different needs and monitoring the progress individual learners make. One participant suggested that reports produced by regional consortia lack sufficient detail on the activities utilised by the grant.

“How can it be measured effectively when each child's needs are different- we can talk in general terms e.g., most but across the system there are many, many children/young people who are slipping through the net.” (Participant 1)

“I think it's reasonable to suggest that a range of organisations 'can' monitor activities, but the underlying issue is the broader role of organisations in monitoring both the spend and the performance of schools and whether there is a strategic and properly understood approach to what the funding is designed to achieve.” (Participant 25)

“The current monitoring reports received from consortia lack sufficient detail.” (Participant 22)

4.41 Theme 2: Effective monitoring

The second theme is around good and routine monitoring systems being in place, and that the information is shared within the system. The respondents suggested:

“The Welsh Government can effectively monitor the PDG spending activities through the reporting mechanisms and PDG leads in the consortia. The

robust regional grant planning tool provides school leaders, consortia, and LA officers an overview of effective grant planning spending in each school.”
(Participant 19)

“Estyn inspections routinely look at how PDG is spent and monitored.”
(Participant 26)

4.42 **Theme 3: Collaborative working**

The need for collaborative working to support the monitoring activities was pointed to by respondents.

“A coordinated approach is required to monitor the funding if we are to have a 360 view of effectiveness.” (Participant 1)

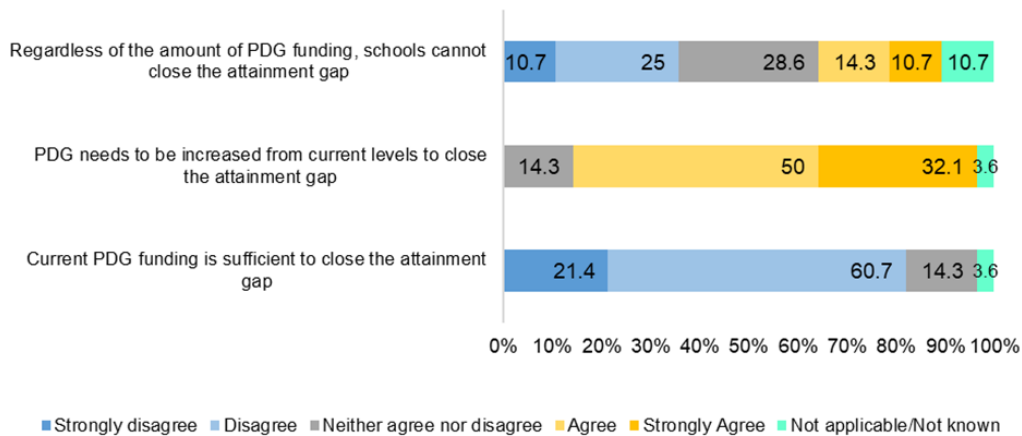
“I think it's reasonable to suggest that a range of organisations 'can' monitor activities, but the underlying issue is the broader role of organisations in monitoring both the spend and the performance of schools and whether there is a strategic and properly understood approach to what the funding is designed to achieve - there can often be a disconnect between organisations depending on their own priorities, so coherence is essential.” (Participant 25)

4.43 **Summary:** There were two views on the monitoring activities. There was overall agreement that schools can best monitor PDG, it was believed however, that other agency's ability to monitor the PDG was hampered by a lack of collaborative working across the system.

PDG and closing the attainment gap

4.44 This question centred on understanding if participants thought that PDG could close the attainment gap or if other finances or support were needed. Most participants do not consider the PDG funding adequate to help close the attainment gap; 50% (n=14) agreed and 32% (n=9) strongly agreed that PDG funding needs to be increased. Correspondingly, most participants disagreed and strongly disagreed that the current funding is sufficient to close the attainment gap. Specifically, 61% (n=17) disagreed and 21% (n=6) strongly disagreed with the statement.

Figure 4.8 Is PDG funding sufficient to help schools to close the attainment gap?



4.45 The open-ended question was: **Please provide any additional comments on the allocation of funding to support closing the attainment gap between disadvantaged learners and their peers.** The open-ended question produced 13 responses from the participants; one broad theme was developed.

4.46 Theme 1: Wider context

The reduction of the attainment gap is complex and there are many factors that impede the attainment of learners from socio-economically disadvantaged backgrounds. Most of the participants agreed that PDG needs to be considered within a wider context and agencies other than schools also need to contribute to supporting socio-economically disadvantaged learners. The respondents believe that there are learners that are not covered by the grant but who are disadvantaged. Two participants discussed that the focus needs to be on learner progress over the course of their education.

“PDG isn’t the whole answer. There are levels of deprivation that are not captured within the PDG system and as such this mechanism is not fit for purpose - it is not a school specific issue.” (Participant 1)

“Closing the attainment gap is not the responsibility of schools alone [...]” (Participant 24)

“School need support from various agencies to assist them to close the gap.” (Participant 7)

“Reluctantly agree with the final statement on closing the attainment gap. Schools can help, but there are far wider social and historic (arguably the class system) issues that will need to be addressed before any meaningful impact can be made. More and more children being eligible for support (being true to the e-FSM ideal) simply dilutes the amount of money.” (Participant 25)

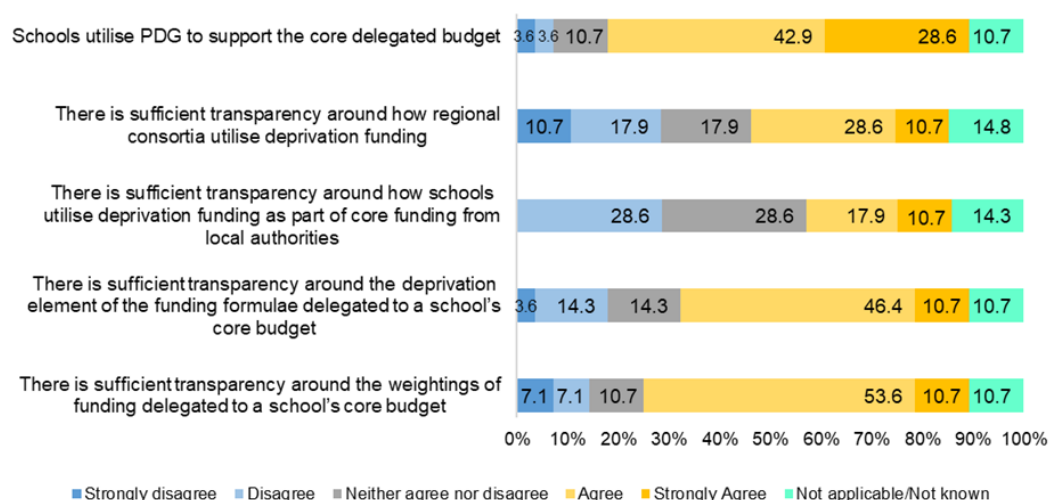
“Closing the Gap language puts a negative focus on the effectiveness of the PDG. Language should include ‘progress made’.” (Participant 15)

4.47 **Summary:** The survey responses indicate that the education system would benefit from increased funding to support the closing of the attainment gap. The open-ended responses highlight the difficulty and complex issues that are faced by the education system when trying to tackle the attainment gap.

Transparency of funding

4.48 This question sought understanding of the transparency at a school-level and more widely in relation to funding to support socio-economically disadvantaged learners. More than half of this sample considered that schools use the PDG funding to support the core delegated budget; 43% (n=12) agreed and 29% (n=7) strongly agreed with the statement. Subsequently, the findings suggest that there is sufficient transparency around weightings of funding delegated to a school’s core budget as 54% (n=15) selected ‘agree’ and 11% (n=3) selected ‘strongly agree’.

Figure 4.9 The calculations and allocation of deprivation funding in educational settings



4.49 The open-ended question was: **Please provide any additional comments on the funding calculations and allocation of the PDG funding.** The open-ended question produced 8 responses. Two themes were developed around the transparency.

4.50 Theme 1: Lack of transparency

The first theme was the difficulty in tracking the schools spending in line with the wider funding.

“There is information in school development plans - however, this can be limited.” (Participant 16)

“Under the current regs whilst funding maybe delegated on various factors including deprivation, it is up to the school to decide how that funding is spent. It would be difficult to track how much is being spent on deprivation.”
(Participant 7)

4.51 **Theme 2: Support core funding**

Schools using PDG as part of the core funding:

Two respondents had opposing views on schools using PDG as part of the core funding:

“Schools utilise PDG in line with the grant terms and conditions and do not supplement core funding.” (Participant 15)

“PDG has become a necessary part of budgets and schools who do not have PDG funding to the same amount are not able to support learners in the same way.” (Participant 1)

4.52 **Summary:** While there were varying opinions on schools using PDG as part of the core funding, the survey responses indicate that schools are using PDG as part of their core budget. There was a consensus that there is limited information on how PDG and the core element of funding for disadvantage is used, meaning a lack of transparency at school level.

Summary:

4.53 Over the range of the open-ended questions responded to in the survey three main themes are apparent.

4.54 First, the respondents believe that eligibility for e-FSM, although a comprehensive measure of socio-economic disadvantage, fails to capture some learners who are living in poverty. This can be due to disadvantage being broader than socio-economic status, and changes to policy meaning families move in and out of eligibility. The survey responses indicate that 35% of respondents agreed and 55% strongly agreed that there needs to be other measures of socio-economic disadvantage. There was a concern around the cost-of-living crisis meaning that more families will have less available income to support their children. Parental engagement and attendance were both mentioned as ways that learners could be disadvantaged that are not directly linked to poverty. The roll out of free school meals in the primary schools was a concern for participants as this could undermine the use of eFSM eligibility as an indicator of poverty. However, the response did not suggest any other measures that would be reliable to serve as a proxy measure for disadvantage.

4.55 Second, respondents believe schools need greater support and guidance on the implementation of the grant. Participants believe that the effective targeting of the PDG is undermined by the lack of guidance on effective interventions or strategies

that close the attainment gap. Although the respondents in the survey suggest that local knowledge of the cohort (36% agreed and 46% strongly agreed) was important to target the PDG funding, there was still the need for more information sharing and guidance on how to support socio-economically disadvantaged learners.

4.56 The third overarching theme was that current approaches to implementation and monitoring limits the effective targeting of learners. The survey also identified 32% (n=9) agreed and 32% (n=9) strongly agreed that there needs to be better monitoring around the impact of PDG. The administration of the grant meant that provision cannot be planned effectively in some instances, and this can lead to schools not being able to embed practice, particularly as the grant cycle is short. The lack of strategic planning created reactive rather than preventative spending patterns. Poor monitoring activities and schools not using the grant for the intended purpose undermines identifying effective practice, information sharing and arguably effective targeting of the learners who are disadvantaged.

5. Interviews findings

5.1 This section of the report details the findings from the interviews. In total, 10 interviews were conducted over Microsoft Teams, two of the interviews were with two individuals. Participants represented a wide range of the middle tier of the education system including representatives of local authorities, regional consortia and Welsh Government officials. One headteacher was interviewed and representatives from the early years PDG.

5.2 There were five main themes identified and several subthemes, see Table 5.1 themes and sub themes.

Table 5.1 Themes and sub-themes

Theme	Targeting	Monitoring	Outcomes	Implementation	Transparency	Future needs
Subtheme	Not based on needs	Lack of monitoring	Stagnant national outcomes	Design and grant structure	Lack of transparency	Re focus
Subtheme	Targeting going forward	Focus on poverty and sharing good practice	Attribution	School implementation	Training and guidance and	Guidance and raining
Subtheme			Wider outcome measures		System funding	Joint/cross working
Subtheme						Further consultation

Theme 1: Targeting

5.3 **Sub themes:** Not based on needs, Targeting going forwards

Not needs based:

5.4 Half of the participants discussed that e-FSM learners are not homogeneous, and this makes it difficult to target the grant to only one 'set' of learners. All the participants discussed that provision should be based on learner needs. Eligibility for e-FSM may not capture the intersectionality of the learners who could be disadvantaged due to wider issues than income deprivation, for example lack of parental engagement, in work poverty, and additional needs.

"I don't think it does so much anymore because disadvantage has changed quite a lot. I think it's not just pupils who are on free school meals are disadvantaged these days. You know, you've got, and I hate to use this type of terminology, but you have the working poor, so some people who are eligible for Universal Credit who aren't eligible for possibly PDG access so, I

think there are lots of people which are not covered there, so I think it should be expanded to more learners.” (Interview 3)

“Well, all learners really, I mean, learners are learners, aren't they? My feeling on that is that children don't come nice and neatly packed up as one or the other. In terms of their additional learning needs, they don't just come as ASD or SEBD; they'll come as in combinations, you know, factor into that the social deprivation issues [...] the cognition and learning, [...] just their own personality types and stuff so, you know, everybody presents differently, don't they? So I think it's a danger in categorising any learners in terms of that but what we are saying is, primarily free school meals, we are targeting those children who we know experience high levels of poverty and have particular issues in that home environment. But some of them may not have any learning difficulties at all, so it needs to be focused on what those children need and I think that's why sometimes it probably isn't as targeted as it could be because sometimes it can be very difficult to break those groups down into more tangible groups. Sometimes they tend to be dealt with as a homogenous group, which sometimes doesn't help as well.” (Interview 8)

5.5 Understanding learner needs in relation to targeting provision was discussed by four participants. Learner needs and disadvantage can be identified by the practitioners using their local knowledge of the school, by engaging with families and understanding the barriers that might be in place.

“I would agree with that, and that goes back to my point at the beginning that, actually, some of the children that are coming through that you're making as disadvantaged, when you sit them in front of a teacher, a teacher will think they're more advantaged than some of the children that haven't had access to those provisions. But only a teacher would know that, only the practitioner that's with that child would know that.” (Interview 4)

Targeting going forward:

5.6 One issue that participants identified was the risk of undermining the e-FSM data set due to the roll out of universal free school meals; there was a concern that schools will miss out on PDG as parents will not register eligibility when they claim. This is one area where there needs to be consideration of policy changes having an unintended consequence on the ground.

“Well, it's especially true now because in Wales, of course, the aim is that all pupils will be allowed to have free school meals anyway so, that indicator is fast disappearing anyway, and we need to find something else. But no, definitely free school meals has never been the right indicator to identify vulnerable pupils.” (Participant 2)

5.7 Five participants discussed that for the PDG moving forward, other areas need to come into the focus of the grant to support learners. The degree of family engagement, community and area deprivation were important to targeting the grant effectively. Incorporating working with families to understand the needs of the learners, working within the community to identify not only the needs of the cohort but identify the services that families and the learners can access.

“I think what the question is, ‘Who do we mean by learners who are disadvantaged?’ and I think the fact that PDG is coupled to FSM entitlement has its positives because it is reaching a large number of that population, but I think we are seeing, aren't we, in schools and in society that there are perhaps children who are not quite at the threshold for family entitlement or don't take up that entitlement who are disadvantaged as well. I think that's where schools struggle really to see how the PDG can effectively support them and how the system can see how we struggle because it's coupled to FSM.” (Interview 1)

“I've never really been one to look at [...] particularly when I used to do a lot of analysis of outcomes data for GCSE, to look at that gap between free school meal and not free school meal because every one of those kids has a story. Every one of those kids is different. Every one of those kids has an issue and it's dangerous, [...] we've spent a long time trying to, you would coin the phrase “close the gap.” Primarily, that hasn't happened, but I think we've done well to maintain the gap because I think society's changing continually as well so in that measure, nothing's ever static and nothing's ever the same. I always felt that was a crude way of looking at it. And I think we've got to move to a more bespoke, focused way, looking more at communities possibly, looking more at the needs of specific schools located within communities.” (Interview 8)

Theme 2: Monitoring

5.8 **Sub themes:** Lack of monitoring, focus on disadvantage and sharing good practice

5.9 **Lack of monitoring:**

There were 5 participants that discussed that there were monitoring activities in place, this was done mainly through the school development plans. Participants were aware of Estyn's monitoring and sharing of good practice. However, eight participants also discussed that there were issues with the monitoring activities. Participants questioned the effectiveness of the monitoring activities in relation to isolating outcomes attributable to the PDG funding and the lack of systematic monitoring of spending, making identifying good practice difficult.

I: So in terms of monitoring, do you think there's effective monitoring systems in place?

R: No, no.

I: Okay, on all levels?

R: On all levels, I would say, and again, I would say that there are exemplar probably examples, but I don't think that's the norm. But, I mean, this is the issue across so many things, isn't it? ... we as a system, and I'd say government, are not very good at this either, we can talk about what money was spent on; what we can't do is evidence how that made a difference because we can't link it back to outcomes.” (Interview 6)

“Yeah, you know, if you take Estyn as (a) the regulator and (b) part of its role to share practice, exactly what you described there, you question at times how they've got to that conclusion because of the lack of detail to support what's being put forward.” (Interview 9)

“We do give grants to heads and schools, and we ask for a very high level of accountability under the terms and conditions, but if you look at their whole school budget, it's a small part of that really...” (Interview 1)

“You are right. There is a difference between monitoring and outcomes, but I do think the monitoring is really important because it's a prerequisite to being able to articulate what your outcomes might be. If you haven't got sophisticated means of monitoring what you're doing, if that's not a reliable system, then you can't start to even think about unpacking what the outcomes may have been, however you end up having to articulate those. I just don't get a sense, you know, I think there were a couple of consortia partners we'd speak to where they had quite tight systems in place for monitoring [...]” (Interview 6)

5.10 Focus on disadvantage and sharing good practice:

In total, 5 participants felt that it was necessary to re-focus on the monitoring of PDG. Considering the different grants, and elements of funding for disadvantage (in schools' core budgets) there needed to be a refocus on tracking poverty and its impact on attainment through a wider lens than just the PDG. In total, six participants discussed that the monitoring should not be used just for accountability and that there was a lack of collaborative working to identify effective practice that can be disseminated. Monitoring activities needed to identify for schools, for the local authorities and regional consortia what effective practice looks like on all levels of the system with regards to impacting socio-economically disadvantaged learners.

“I think there should be an expectation that you produce evidence of some successes you've had and things that haven't worked and what you're going to change because it doesn't always work either. I think that's the point, isn't it?” (Interview 7)

Theme 3: Outcomes

5.11 Sub themes: Stagnant national outcomes, attribution, wider outcome measures.

Stagnant national outcomes:

5.12 Six participants believed that the PDG had not impacted on the outcomes of socio-economically disadvantaged learners. This was particularly evident at key stage 4. While some impact could be seen at individual pupil level, national levels of attainment had not changed. There were 4 participants that also felt that there were difficulties measuring outcomes.

“...it was definitely trying to push children through the academic system. And they were concentrating on having as much children as they could to reach

that C level, to the detriment of children who could have actually reached A, but they were happy on the C. It was a factory of moving children through the system and children not identifying their true hidden talents maybe, so it was quite academic. You had to pass your science and your English and your maths and your Welsh, and that was it. Maybe somebody had a musical ability, or they had an art ability or a sporting ability, and that wasn't really fostered and encouraged because the system persuaded schools they had to think in these kind of blinkered view. It's changing and the grant promoted that blinkered view.” (Interview 2)

“Well, looking at the data, no, it's not that successful because I know Welsh Government have spent a huge amount of money on this grant over a number of years.” (Interview 2)

“No, you can't, and often with many things like around intervention, everything and the kitchen sink gets thrown, and then it's really difficult to identify what has worked and what hasn't worked.” (Interview 7)

Attribution:

5.13 The difficulty in not reporting outcomes was attributed to a variety of reasons. Four of the participants discussed that there were changes in the way socio-economic disadvantage was captured. This included changes in the policy (UC) and learners moving in and out of eligibility, particularly with the continuous impact COVID-19 has played in the education system. There are also the issues of the e-FSM group not being a homogenous group, and interventions funded by the PDG being targeted at a wider range of learners than just e-FSM learners. There was the risk that this meant some eligible learners are missing out, particularly more able and talented learners (MAT) as there was a lack of focus to push the learners to attain higher grades. A systematic approach to collect outcome data from schools was lacking and, while there were ways to track individual interventions, there were difficulties in tracking an improvement in standards.

“I don't necessarily have the answers. Trying to pin outcomes down on the PDG grant is not going to get us anywhere and it ties heads and schools up in knots. What we've got to be looking at is how are schools, and how the education system collectively, use all those tools to improve outcomes. Maybe just focusing narrowly on the PDG grant hasn't helped that.” (Interview 1)

“I think we need something for the whole system which captures the round. You know, what this could look like...isn't there, by just trying to define something for a group of learners, you lower their expectations. So if you set the expectations for everybody at the same on a similar journey, you'll have different starting points for these youngsters towards that journey, but you want to make sure that the expectation is there for everybody.” (Interview 9)

Wider outcomes:

5.14 Nine participants emphasised on the need to capture wider outcomes linked to individual progress. The outcomes of gaining 5 GCSEs (A*- C) was used as an example of one of the ways that progress is measured for PDG. There was the need to measure impact in other ways that is not focused on the GCSEs (A*- C) to identify the impact that PDG has made, an alternative discussed by the participants was measuring learners on individual progress measures.

“The problem we’ve got at the moment, and this is a debate we’re having with our schools now is that within the context of the new curriculum, we have the new progression code, and schools are now trying to understand and get their heads around what progression looks like ‘cause progression is different to assessment, right? And the documentation coming out of Welsh Government is saying we don’t want any more high stakes, high accountability outcomes related sort of stuff. So I think it’s now perhaps more shifting to the individual journeys that pupils are making. But I agree with what you’re saying: that needs to be recognised and articulated in terms of evidence that this child was here, we’ve done this, and now they’re here. I think it’s more than just test data. For years now my teachers used to say to me, ‘Oh yeah, they’re doing great. Rapid reading interventions, they started here; they’re up to here.’ I go into a class and say, ‘Go and get me a box. Come and sit here and have a read for a bit.’ I’m going, ‘Really?’ and it’s sometimes you’ve got to be really realistic but at the same time, there’s got to be an element of challenge in it as well, you know, because we need to find out where’s this money having the greatest impact.” (Interview 8)

“It’s about looking at individual children rather than a cohort of these are the disadvantaged learners, these are the non-disadvantaged learners, that actually we need to be monitoring progress and what that progress looks like to an individual child.... That also leads on to the kind of discussion about closing the gap as well and you want to be looking at progress for everybody.” (Interview 4)

Theme 4 Implementation

5.15 **Sub themes:** Design and grant structure, school implementation

Design and grant structure:

5.16 Two major issues were identified with the way the grant is administered by the Welsh Government. Firstly, participants discussed the time lag in the data for the calculation of e-FSM. Calculations are based on the PLASC but are not representative of the learners in the school at the time it is disbursed. Secondly, the funding being fixed term means that schools are not getting the chance to embed strategies over a longer period. This impacts the school’s ability to identify and support the learners’ needs. Three participants discussed the additional issue that COVID-19 has created and there needs to be a recognition from the funders that there are still impacts from COVID-19 that need to be addressed.

“The reason I'm more interested in PDG more than anything at the moment is because in the last three years, we've gone from about 28% to 51% children [e-FSM] and obviously, sometimes that funding is still not coming through because it's on historic data.” (Interview 5)

“Yeah, yeah [...] the amount of money that you would have every year would be different, dependent on your pupil numbers, so you couldn't really forecast for three years to have this intervention. So nothing was embedded. There was a danger that, you know, things that you were implementing weren't embedded and as you know, it does take about three years for good practice to embed.” (Interview 2)

School implementation:

5.17 Two participants identified that there is evidence of effective practice in schools and that schools were able to target the grant appropriately. Schools were able to provide enrichment activities and use the grant in creative ways to support learners. Given that there was a time lag in the funding, schools are faced with planning provision that is not based on learners needs. There was also the consensus that the fixed term of the grant meant it was hard retaining staff. Schools were having to rehire and train staff which was an ineffective use of the funds. Given that the grant is linked to attainment this means that schools are negatively focusing on attainment to the detriment of more able students.

“Because it's a grant, because it's fixed term, because it's not whole school budget, there are constraints as to what they can do around staffing, and I think if you talk to schools, that's the biggest frustration.” (Interview 1)

“It takes us almost a term to recruit with HR. By the time you've got a job advert out, you've interviewed, you know, they've given notice, you've lost a chunk of that window to actually implement things.” (Interview 10)

“I think that facing attainment, I think that having that unrealistic five GCSEs is a mark of success. I think that's huge. I think that coming from COVID, I think there's a lot of disengaged pupils. That is a huge issue for schools at the moment, lots of mental health problems and I think the schools are dealing with a lot of issues right now and sometimes it is around getting that pupil in school, so they are ready to learn. So that's not always around the attainment, but getting them there in the first place, which can be quite difficult. And then, obviously, if you've got some pupils there who different levels are, some more able and talented pupils may be slightly losing out. So, there's different cohorts of children, and I think we need to understand that.” (Interview 2)

Theme 5 Transparency:

5.18 **Sub themes:** Lack of transparency, training and guidance and system funding.

Lack of transparency:

5.19 All participants stressed that there was a lack of transparency on the use of the PDG, and this extended to all levels of the education system. They noted that there was very little transparency on how schools were utilising the PDG monies and the impact that those spending patterns had. While there are monitoring activities in place, not enough information could be tracked to the impact of the interventions or spending patterns. There was also concern around the monitoring of funding delegated to the LA and consortia and the transparency and monitoring of the PDG activities as part of the wider system.

I: *“Do you think there's enough monitoring of what the LAs and the regional consortia are doing with their deprivation element of funding to support children? Is there enough monitoring on that level?”*

R: *“No, no, I don't think the word “impact” comes through enough with this, ‘Prove to us how you use the money and the impact it has had on the ground’. Even if it is capturing interviews or case studies with individual families or people, I don't think you can holistically say 70% of the money we've had has done X.” (Interview 7)*

“Not system-wide you can't. If you go to individual schools, you could. But because the criteria isn't clear about its outcome, then you can't then pin impact and value to this funding.” (Interview 9)

Guidance:

5.20 Across five interviews, it was discussed that there needed to be more information on effective practice and understanding around the barriers of poverty. One participant stated that guidance is needed at all levels of the education system to identify effective ways of working.

“It comes in at different levels in the system. So, you get PDG to school. We get PDG as an LA. There's PDG to a consortia. That's a different level again. So what is best practice for the LA to use their PDG on? What is best practice for a school to use their PDG on? And what is best practice for a consortia? Because a consortia couldn't employ like a community liaison officer like we can, so, you know, how do you make that work? What route should that funding model and impact look like? Because they're different tiers.” (Interview 7)

“Perhaps could we make that clearer in terms of really understanding poverty and socio-economic disadvantage, helping schools with those strategies, you know, links with the Sutton Trust [EEF] in terms of the research. So that's one thing for signposting schools to strategies.” (Interview 1)

System funding:

5.21 Three participants discussed that there is a lack of transparency around the funding formulas that local authorities delegate to school's core budgets. The need to identify what equitable provision looks like and for the PDG to be additional funding and not to prop up core funded activities. Two participants from the early

years sector discussed that the funding calculations for PDG in non-maintained settings is complex and lacking information on allocation leading to learners not being covered.

“I think it's really varied. I think that a huge problem is local authority funding. I think as local authorities have pulled funding from schools, so if you've had – and this is in evidence as well, you know. I think there's something coming out of the [...] [Redacted]⁷ report. I think you've noticed that it's never gone up. PDG hasn't gone up in ten years since introduction, so the schools' funding is exactly the same, so I think as we have been putting money into the system, local authorities on their end have been taking money and moving it to different places. So I think there's an issue with the local authority wider schools' funding, and PDG is not having the impact that it should be. I think schools are using it effectively. Schools know their locality. Schools know what they need, and I think they need to be given the autonomy to do so, but I think there is a wider local authority problem because that money then is being used to fill gaps which local authorities have left”. (Interview 3)

“Absolutely, I feel there's a big flaw in the funding formula that's being used there somewhere...there's no clarity and I feel there's a lot of discrepancy there. Yeah, and I don't even know that there's any clarity of when it's comes out, how you find out how much you've got. We don't get notified as a local authority on the early years one. And the reason I know that is because I complained when we had a mini-Estyn inspection..., and I sort of said, you know, ‘We haven't heard. We've not got anything this year despite me emailing Welsh Government and [Redacted]¹⁰’, and Estyn then came back and said, ‘Well, yeah, actually it's published on this website, and here's the link to it’, but we didn't know, and then we'd lost, well, that was over six months, wasn't it, from when it came out.” (Interview 10)

Theme 6: Future needs

5.22 **Sub themes:** Re-focus, guidance and training, joint/cross working, further consultation

Re-focus:

5.23 Respondents believe there needs to be re-thinking about the PDG. Five participants discussed that this was a timely moment in the education system to relook at the grant. With the impact of COVID-19 and the changing way that identifying socio-economic disadvantage might look like in schools, coupled with the changes in policy around the free school meals entitlement and the new curriculum, meant now was a pertinent time in the education system to re-focus the grant.

“I think there just needs to be more focus on disadvantaged learners. That's what there needs to be, a renewed focus, a renewed effort around this group

⁷ Author name redacted to protect participant anonymity.

¹⁰ Organisation name redacted to protect participant anonymity.

of learners. And, you know, it's not just for governments to be paying consortia to be putting people in post to look at this. This should be ingrained in everything they do.” (Interview 3)

“...it's a good time to review it anyway because I think we can become complacent in the system, so, ‘Oh, there's a grant there, and it does A, B and C’, but actually stepping back and saying, ‘Well, actually, this is a real fundamental issue for tackling barrier and disadvantage in the system. It's not just a grant.’, and the fact that schools have been swamped with grants, and local authorities, over the last few years, for all the reasons we understand, it's become another grant. So I welcome the opportunity to re-look at it.” (Interview 1)

“I think the most important thing is for us to be funded for the children that we have got in front of us. To me, that's the biggest thing, not two years ago. I know it's difficult, and we only have PLASC data once a year, but surely from January's data to now, they should be able to do a piece of work to more or less fund us accurately. So are we going to be funded on 2021's next year? I don't know. I don't even know. I don't even ask 'cause you just know it's historic all the time, but whenever the money comes in and we work it out, I always go, ‘Oh well, there's like 25 kids we're not being funded for now, isn't it?’ so we've still got to close the gap and show progress for those children, which is not fair. And equally, I know some schools that their free school meals numbers have dropped [...] they're getting more money and those kids are not even there. They might be in my school, so that is bad, definitely. But our local authority are very aware of that and do keep saying their hands are tied.” (Interview 5)

5.24 An important element in the new thinking should look beyond the schools and include more community and parental engagement.

“So this is a two-pronged thing. First of all, we've got to get the curriculum right this time around in terms of curriculum reform and core purposes because if we can get out children to realise the core purposes, they're going to be better parents and will want to engage more with schools. But we've got a job to do with the parents that have been through our schools, have gone into secondary schools, been in the bottom set in Year 11 and stayed there for five years and then not turned up for the last two years, and people are wondering why, you know. But that's by the by, but I think in terms of communities, I think that certainly is the way forward.” (Interview 8)

“I think it's more about the holistic influence in the community, so how much do you engage those parents? How much support do you give to the parents within the community? It's not just about using the money to make sure you get intervention or a uniform. How do we break this cycle? This cycle's not gone. It's been there for 20 years in my time.” (Interview 7)

Guidance and Professional Learning:

5.25 Professional learning is needed at all levels of the system on what the barriers are for socio-economic disadvantaged learners. There was a strong consensus from 6 participants that there needed to be much more sharing of effective practice. This information needs to be collated widely within the system to support schools to identify relevant strategies. This extended to the organisation that receive PDG and disadvantage funding, the regional consortia and the LAs need to share effective practice so it can be shared across the system.

“I feel that schools need significantly more guidance. It doesn't seem to be one size fits all, if that makes sense. I think we've constantly gone around the houses and how we narrow that attainment gap. I've been in the profession 20 years and there's been some success stories I've seen over my time, but there isn't a clear way of doing this or dealing with this, and it is bespoke to individual schools' needs, and I think they need to understand the ownership of the situation and what they should be expected to do with it.” (Interview 7)

“Yeah, definitely, you know, that's why that's a really important or sort of a key priority, I guess. And in a sense, you'll find that there will be common themes emerging. When I used to have the PDG advisor meeting, consortia would say, ‘Oh, we use so and so because it's something that EEF have said’ so it stands to reason there'll be other local authorities and local consortia areas that are using the same thing, but whether that's done more on the sense of that's the way the individuals are operating rather than that being a systemic approach. A change in personnel can often then mean that things that were in place that were working will fall down because they're not systemic. So, yeah, I do definitely think that is one way, and that economies of scale thing.” (Interview 6)

Collaborative working:

5.26 In total, seven participants identified the need for more collaborative working to support not only schools, but all organisations in the education system and other parts of the public sector. There were also four participants that discussed that schools need to work more collaboratively in clusters and across local authorities.

“You could set up a process. We tend to moderate pupil assessments, don't we? But part of the new school improvement framework in going forward is that schools need to be collaborating and leading beyond the walls of their own school, but you could build in there, couldn't you, a moderation process about the impact of this funding. So, basically, you'll have a group of professionals sitting around the table, saying, ‘Well, we've used this’, and you give them a framework to work within, so when we were talking earlier about school-level funding and cluster-level funding, bring it all together, and the outcome of that moderation is, okay, we want one school-level successful practice, we want one cluster-level successful practice. I think we've got to use the language of successful practice rather than good practice, best practice. You know, your point you made earlier, what is successful in Ynys

Môn might not be successful in Gwynedd or Flint or whatever. So it's successful to that locality.” (Interview 9)

“When are we ever actually working together to actually share resources? If they can't afford a parental engagement officer themselves, buy it in between three of them. You know what I mean? If you can't afford one, you probably don't need it full time, but you certainly would need it for some of those families, so share with your school down the road, share with your neighbour, you know.” (Interview 8)

“I think there's probably people that can better articulate the poverty piece really [...] PDG shouldn't just be within the interests of the education department [...] Is it enough of a cabinet priority? What about if we say, ‘Well okay, in the current structure, we can't use PDG, going back to this dreaded mattress, we can't use PDG to buy mattresses, but health and social services have got a definite interest in making sure that children have got what they need’, you know, blah-blah-blah. So can we channel other funding sources through PDG? Because ultimately, as you say, everything comes back to education. It's a bit of a chicken and egg, isn't it?” (Interview 6)

Further consultation:

5.27 Participants believe that the WG need to address the implications for the PDG of the introduction of universal free school meals in primary schools. They should also provide more funding to tackle disadvantage in core funding, thus allowing PDG to be used to address the additional barriers learners face due to poverty. PDG should not be used to support core funding and the WG should ensure that this does not happen.

“You could argue, you know, what is unclear is where is the most value in the PDG funding, and some schools would be arguing that the way they use it benefits the learners that they've got. But if you're looking at the group that is actually targeted, I'm not convinced that – it's too simplistic a mechanism to say, yes, you're entitled to it because of, but then when that funding leaves Welsh Government and gets into schools, the tracking of does the full value per individual give added value to the individual, then that is very difficult to prove and in some instances, I would argue it's used to prop up other elements of the school infrastructure rather than the very direct, if you like, support for these learners. It's also being used in some schools to ensure that they have full members of staff, especially in the smaller primary schools, in front of classes rather than have mixed classes. So indirectly, you can argue it does support all the learners, which would include this group, but you could argue also that it dilutes direct support to this group as well.” (Interview 9)

“...the other thing for me is this middle band of families that because their mums and dads take on overtime, they're not quite enough to be in the PDG zone. So that is a real concern for me because often these are the families that are trying to, you know, present the best work ethic, et cetera, but then

they're missing time with their children. They have no spare money for after-school clubs or extracurricular activities. So I think it's the element, the whole of it. (Interview 7)

"There just doesn't seem to be as much control in place of the early years than there is with the main PDG. So the main PDG, they seem to have far more detail on it. It feels like there's far more monitoring going on in place in the main PDG, and then when it comes to the other elements, it doesn't feel like there's a central person in the organisation looking after each of the elements. It feels like the central person is looking after the main PDG, and then the other elements are kind of slipping by the wayside just a little bit." (Interview 4)

"I don't think it does so much anymore because disadvantage has changed quite a lot. I think it's not just pupils who are on free school meals are disadvantaged these days. You know, you've got, and I hate to use this type of terminology, but you have the working poor, so some people who are eligible for Universal Credit who aren't eligible for possibly PDG Access. So I think there are lots of people which are not covered there, so I think it should be expanded to more learners." (Interview 3)

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Summary:

5.28 The interviews provided rich data on the participants' experiences and perceptions of the PDG. Participants agreed that there were examples of good practice and that there needed to be more monitoring of the grant at all levels; this included tracking spending activities and their impact. Participants discussed the difficulties schools face implementing the grant due to the grant structure and the wider socio-economic disadvantage schools are facing within their communities. Professional learning was needed at all levels of the system on how schools could best support pupils experiencing poverty. Concerns were raised about the changes in policy around the rollout of free school meals and the possible undermining of the e-FSM data set and the impact of COVID-19. Greater emphasis on community focused schools was needed and more collaborative working; this includes working with families to understand the needs of the learners. Participants agreed that the impact of the grant was difficult to attribute impact to a single funding stream. It was apparent that these key members of the middle tier in education in Wales were often unclear about the purpose of the PDG, issues around eligibility, how impact might be monitored and evaluated and the bodies of knowledge available to support effective

use of the grant. This is likely to be contributing to the lack of success the PDG is having in reducing the attainment gap in Wales.

6. Conclusions and recommendations

6.1 The Welsh Government continue to make a commitment to support learners from disadvantaged backgrounds. The updated [Programme for Government](#) (GOV.WALES.UK, 2021) and recent publication of [Community Focused Schools](#) (GOV.WALES.UK, 2022a) guidance demonstrates the government's commitment and understanding of the issues that schools are facing. The guidance will support some of the findings of this report. The education minister in his [Oral Statement](#) (Senedd Cymru, 2023) set out the incoming vision of the Welsh education system and reform agenda which reflects some of the findings of this report. It is a welcome commitment to supporting disadvantaged learners in Wales.

6.2 This review was commissioned to evaluate the PDG and provide suggestions to how the PDG can be adapted to support the grant's aims and the wider aims in the education system in tackling the poverty attainment gap. There have been two significant publications around the PDG and the targeted funding for disadvantaged learners: [Evaluation of the Pupil Development Grant](#) (Pye et al., 2017) and [On the money? Targeted funding to improve educational outcomes](#) (National assembly for Wales, 2018). Both reports discuss and make recommendations around the PDG. As such there has been little change in the way that PDG has been designed and implemented since the publication of the reports. There is growing evidence to suggest that the PDG has not had the intended impact. Learners from disadvantaged backgrounds are leaving school 22-23 months behind non-e-FSM learners and there is some evidence to suggest that Wales maybe lagging behind other jurisdictions in closing the attainment gap (Cardim-Dias and Sibieta, 2022). This report is the third Welsh-specific focus on disadvantage funding in schools and much of the recommendations align with previous research. This provides a powerful account of the needs with regards to PDG in Wales.

6.3 There were several conclusions that can be summarised from the different data points with regards to the effective targeting of the PDG.

- Changes in the welfare system and the roll-out of free school meals have led to concerns that the e-FSM data set is being undermined. Across the surveys and interviews, participants were concerned that parents were not going to claim, and that schools would miss out on funding, adding to additional pressure for school leaders to identify disadvantaged learners.
- The timing of the grant was problematic for three main reasons. First, the grant structure ran in line with the financial year and not the academic year making planning provision difficult. Second, the data used to calculate the PDG funding is up to 18 months out of date, meaning that the funding did not always match the learners in real time. Third, the short funding cycle of the grant was a barrier to implement long term strategies and embed practice.

- There is a general lack of detailed information available on how schools are using funding to support disadvantaged learners. Whilst schools in Wales and England are required to report on their spending activities, for example through the publication of statements on their school website, there is no collation of this key information. This amounts to an accountability endeavour for school leaders that does not benefit the education system. While the information on spending gives information to parents and the community, it is a missed opportunity to use existing information in a transformative way.
- Schools should report on PDG spending and activities in a simple and clear way. This should also be linked to the guidance, e.g., what is spent or undertaken under recommended approaches listed in the guidance. This should be done in ways that allow Welsh Government, regional consortia and local authorities to collate activities across schools, understand differences in provision and spread best practice across schools and areas. This need not be limited to PDG and could be undertaken for all funding linked to learner disadvantage.
- There was a lack of detailed guidance on the effective use of PDG that is linked to quantifiable impact. This was extended to the deprivation funding within the LA and regional consortia. The guidance needs to be detailed so it can be repeated in other settings.
- Common uses of PDG included:
 - Supporting numeracy and literacy
 - Parental engagement
 - Training and deployment of staff including teaching assistants
 - Employing specialist services within schools
 - Co-operative working with schools, LAs and regional consortia
 - Improving attendance
- Although schools are allowed autonomy on how to use the grant, the definition of learner disadvantage used in the grant failed to fully encompass what this looks like in the education system. Whilst low income was perceived to be important, participants felt that other aspects contribute to learner disadvantage needed to be considered as well.
- The indicator of e-FSM failed to capture some learners. This included families facing in-work poverty, a lack of parental engagement and where key services are not always available in the community. There was a consensus that the e-FSM indicator does not fully capture disadvantaged. However other research suggests while not a precise measure in the Welsh context it does work to identify the majority of learners facing disadvantage (Taylor, 2018).
- Socially deprived areas are faced with many challenging issues: retaining teachers; employing high quality teachers; lack of parental engagement; poor social housing; and high crime rates.
- There is mixed evidence from all nations about the impact of disadvantage funding, particularly based on large scale national numeracy and literacy

results. There has been little progress in narrowing the attainment gap. There are some small trends to suggest that the funding is having a small impact on disadvantaged learners, but there is a lack of any quantifiable data. This needs to be addressed with clear outcomes and means of tracking them for the PDG to support schools to target the funding to support learner progress.

- Welsh Government and local authorities need to focus on making sure schools are sufficiently funded for core provision, so that PDG activities are 'additional' provision to support disadvantaged learners.

Recommendations

- 6.4 Schools were not within the scope of this research project thus, identifying effective strategies and targeting is only limited to the perspectives of the middle tier of the education system. The Welsh Government should consider interviewing schools to identify the views of school staff around the effective strategies, monitoring activities and targeting of the PDG.
- 6.5 Given the introduction of universal entitlement to FSM in primary schools, Welsh Government should reconsider the approach to calculating PDG due to concerns around the data set being compromised by universal free school meals.
- 6.6 Welsh Government should provide regularly updated and clear guidance to schools, local authorities, and regional consortia on effective, evidence-informed use of the PDG.
- 6.7 Welsh Government should fund research to be conducted with schools to explore the targeting and areas of effective practice with regards to PDG. This could identify areas of need.
- 6.8 Welsh Government should ensure that higher education institutions, local authorities, and regional consortia provide career-long professional learning for education professionals on the impacts of socio-economic disadvantage on learning. Including how funding can be used effectively to mitigate the poverty related attainment gap. This needs to be embedded in the workforce beginning in initial teacher education.
- 6.9 Welsh Government should consider changes to the administration of the PDG so that it can be better aligned to school planning cycles.
- 6.10 PDG funding is generally confirmed annually. This may hinder schools in planning long-term strategies. Closing the attainment gap is a long-term goal; hence the Welsh Government should allocate the PDG on 4/5-year cycles to allow schools to plan longer term strategies, embed practice and retain staff.
- 6.11 Whilst final decisions on the use of the grant should rest with headteachers, the Welsh Government should provide clear guidance on what the PDG may and may not be used to fund.

- 6.12 The Welsh Government, local authorities and regional consortia should work together more closely to ensure the effective use of the PDG.
- 6.13 The Welsh Government, local authorities and school improvement services should agree a consistent approach to learner progression that they will collectively use, and encourage schools to use, in monitoring and evaluating the impact of the PDG on wellbeing and attainment, particularly with respect to early literacy and numeracy. This information can feed into to work already being carried out on the wider information ecosystem in the Welsh education system [Developing a new data and information ecosystem that supports the reformed school system in Wales.](#)
- 6.14 The information on the use of the PDG reported by schools should be collated by local authorities and the Welsh Government to provide a repository of existing practice. Northern Ireland and Scotland provide examples of how this might be done.

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Appendix A – Consent forms for survey instrument

English Version:

Consent statement:

- I have read and understood the information sheet provided for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.
- I understand that my participation in this study is voluntary and that I am free to withdraw my data from the evaluation at any time before the 15th January 2023 without giving any reason. After this date, the anonymised data will be included in the analysis.
- I understand that I can omit questions in the survey by leaving them blank.
- I understand that an anonymised version of my data may be used in a publication. Please note no identifiable information will be used.
- I understand that my data will be securely stored for a minimum of 10 years, in line with Bangor University Research Data Management Policy.

Please provide consent

I do not consent

I consent to taking part

Welsh version:

Datganiad caniatâd:

- Rwyf wedi darllen a deall y daflen wybodaeth a ddarparwyd ar gyfer yr astudiaeth uchod. Rwyf wedi cael cyfle i ystyried y wybodaeth, gofyn cwestiynau ac wedi cael atebion boddhaol i'r rhain.
- Rwy'n deall fy mod yn cymryd rhan yn yr astudiaeth hon yn wirfoddol a fy mod yn rhydd i dynnu fy nata yn ôl o'r gwerthusiad ar unrhyw adeg cyn 15 Ionawr 2023 heb roi unrhyw reswm. Ar ôl y dyddiad hwn, bydd y data dienw yn cael ei gynnwys yn y dadansoddiad.
- Rwy'n deall y gallaf hepgor cwestiynau yn yr arolwg trwy eu gadael yn wag.
- Rwy'n deall y gall fersiwn dienw o'm data gael ei ddefnyddio mewn cyhoeddiad. Sylwch na fydd unrhyw wybodaeth adnabyddadwy yn cael ei defnyddio.
- Rwy'n deall y bydd fy nata yn cael ei storio'n ddiogel am o leiaf 10 mlynedd, yn unol â Pholisi Rheoli Data Ymchwil Prifysgol Bangor.

Rhowch ganiatâd

Nid wyf yn cydsynio

Rwy'n cydsynio i gymryd rhan

Appendix B – PDG surveys

English Version

Demographics

Q1. Please provide your job title in the space below.

Q2. Please indicate the number of years you have been working in the education system.

- 0 to 5 years
- 6 to 10 years
- 11 to 15 years
- 16 to 20 years
- 21 to 25 years
- 26 to 30 years
- Over 30 years

Q3. Have you had experience in a school, in one of the following roles: teaching/ leadership/ assessment/monitoring?

- Yes
- No

Q4. In which region is your organisation based?

- North Wales
- Mid and West Wales
- South Wales West
- South Wales East
- South Wales Central
- All Wales

Q5. In which County or Counties in Wales does your organisation work in?

- All Wales
- Isle of Anglesey
- Gwynedd
- Conwy

- Denbighshire
- Flintshire
- Wrexham
- Powys
- Ceredigion
- Pembrokeshire
- Carmarthenshire
- Swansea
- Neath Port Talbot
- Bridgend
- The Vale of Glamorgan
- Rhondda Cynon Taf
- Merthyr Tydfil
- Caerphilly
- Blaenau Gwent
- Torfaen
- Monmouthshire
- Newport
- Cardiff

Q6. Would you like to provide the name of the organisation for which you work?

Targeting of the Pupil Development Grant in educational settings

The Pupil Development Grant (PDG) is a Welsh Government grant that aims to improve outcomes for disadvantaged learners. The amount of PDG funding awarded to schools is based on the number of pupils eligible for free school meals (eFSM).

This section of the survey asks you about your views on how the PDG is currently targeted to support disadvantaged learners across different sectors of the education system.

We understand that you might not have direct experience within every sector of the education system, but it would be helpful to gain an insight of your thoughts and perceptions across the range of education settings listed below:

- Maintained schools delivering nursery education (nursery; primary; 3-16) or

- Funded non-maintained nursery settings (e.g. daycare; sessional; Clych Meithrin; childminders)
- Maintained primary schools are for learners aged 4-11 years old. These can be community schools/voluntary controlled or voluntary aided.
- Maintained middle schools are for learners aged 3 or 4-16 or 19 years old.
- Maintained secondary schools are for learners aged 11-16 or 11-18 years old.
- Maintained special educational needs (SEN) schools are for learners with special educational needs.
- Pupil Referral Units (PRUs) are for learners who are not attending mainstream schools for various reasons (i.e., ill or injured, have been excluded, have emotional and behavioural difficulties or be habitual non-attenders).
- Learners in local authority care (LAC) can be in *any* educational setting.

Q7. The following questions ask for your views about the targeting of the PDG to learners the grant is designed to support. By 'effectively target' we mean there are different types of school setting able to use PDG income on the learners that the PDG grant is designed to support. Below is a list of statements on how effectively the PDG is targeted to support disadvantaged learners in different education settings. Please select the response which best describes your answer to each statement by ticking one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
Early years settings effectively target the PDG to support disadvantaged learners						
Maintained primary schools effectively target the PDG to support disadvantaged learners						
Maintained secondary schools effectively target the PDG to support disadvantaged learners						
Middle schools effectively target the PDG to support disadvantaged learners						
SEN schools effectively target the PDG to support disadvantaged learners						
PRUs effectively target the PDG to support disadvantaged learners						
Education settings effectively target the PDG to support disadvantaged learners in local authority care						

Q8. Please provide any additional comments on the targeting of PDG:

Implementation of provision funded by PDG

School leaders have a degree of autonomy and flexibility on how to utilise PDG funding in their school. We want to understand if the support and/ or provision they implement using PGD is considered to be effective.

The following questions ask you about whether schools implement provision funded by PDG effectively.

Examples include:

Employment of teaching assistance using PDG funding is implemented effectively to support the needs of the targeted learners.

Literacy programmes purchased with the PDG funding are implemented effectively to support the needs of the targeted learners.

Wellbeing activities purchased with the PDG funding are implemented effectively to the targeted learners.

Q9. Below is a list of statements on implementation of provision funded by PDG in different education settings. Please select the response which best describes whether you agree or disagree to each statement below. Please tick one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
Early years settings implement provision funded by PDG effectively						
Maintained primary schools implement provision funded by PDG effectively						
Middle schools implement provision funded by PDG effectively						
Maintained secondary schools implement provision funded by PDG effectively						
SEN schools implement provision funded by PDG effectively						
PRUs implement provision funded by PDG effectively						
Education settings with learners in local authority care implement provision funded by PDG effectively						

Q10. Please provide any additional comments on the implementation of provision funded by PDG:

Impact of Pupil Development Grant on learners

PDG is designed to mitigate some of the additional barriers that learners from disadvantaged backgrounds may face. We would like to understand your thoughts on whether current PDG funded strategies or provision positively impact the disadvantaged learners that the grant is designed to support.

By 'impact' we mean a range of impacts that positively support learners to overcome the additional barriers learners may face from disadvantaged backgrounds.

Q11. Below is a list of statements on different impacts that strategies or provision funded by PDG may accrue. Please select the response which best describes whether you agree or disagree to each statement below. Please tick one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
Social and emotional skills						
Parental engagement						
Attainment						
Inclusion of extra curricula activities						
Attendance						
Mental health and well-being						

Q12. Please provide any additional comments on the impact of strategies or provision funded by PDG:

Focus of Pupil Development Grant

School leaders have a degree of autonomy and flexibility on how to utilise PDG funding in their school. We would like to understand where you think PDG funding should be focused, and which approaches you think are the most effective use of resources.

The following question seeks your views about where the PDG spending should be focused.

- Whole school approaches mean provision funded by PDG is available to all learners in the setting.

- Learner specific approaches means provision that is only focused on learners who receive free school meals.
- Wider well-being approaches means provision that is focused on health and wellbeing of learners who receive free school meals and is not linked to attainment.
- Spending based on headteacher knowledge means provision should be tailored to the cohort.

Q13. Below is a list of statements on the focus of PDG spending in the education system. Please select the response which best describes your answer to each statement below by ticking one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
PDG spending should focus on whole school approaches						
PDG spending should focus on pupil specific interventions						
PDG spending should be focused on wider well-being approaches						
PDG spending should be focused on the headteacher's local knowledge of their cohort						

Q14. Please provide any additional comments on the focus of PDG provision:

Effectiveness of free school meals eligibility as a way of identifying learners who are disadvantaged

The PDG aims to target disadvantaged learners. The current proxy measure for this is eligibility for free school meals (e-FSM). This section of the survey aims to discover your views about the effectiveness of eligibility for free school meals as a proxy measure of disadvantage.

The following question asks you about how effective entitlement to a free school meal (e-FSM) is as a measure of disadvantage in learners.

Q15. Below is a list of statements on the indicators of disadvantage learners. Please select the response that best describes your answer to each statement below by ticking one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
Entitlement to free school meals (e-FSM) is an effective indicator of disadvantage in learners						
Other measures of disadvantage need to be considered to identify disadvantaged learners						

Q16. What other indicators do you think could be / need to be considered to help identify disadvantaged learners? Please write your answer in the space below.

Suitability of measures and systems for monitoring PDG activities and impacts.

This section of the survey asks you about the impact measures and systems for monitoring the strategies or provision that is funded by PDG. Schools have autonomy and flexibility to decide what strategies or approaches they use to support disadvantaged learners and there is no commonly agreed method to monitor impacts. Interventions or strategies are tailored to each setting and schools can use the data that is most relevant to the intervention or strategy in use. We want to understand if the data collected at a school level and the monitoring activities are sufficient to demonstrate the impacts of PDG funding.

The following question asks you about current impact measures for assessing the impact of PDG funded support and provision in educational settings.

Q17. Below is a list of statements on monitoring the PDG spending activities. Please select the response that best describes your answer to each statement below by ticking one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
Impact measures are appropriate based on the intervention or strategy(ies) being employed						
More robust data collection methods need to be established to measure impacts for disadvantaged learners						
Impacts need to be directly related to learners' educational attainment						
Impacts need to be related to a range of outcomes (i.e., health, well-being)						

There is sufficient transparency in impacts in relation to interventions and activities funded via PDG						
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Q18. Please provide any additional comments on the impact measures for PDG funded strategies or provision.

The following question asks you about the effective monitoring of PDG spending in educational settings. By this we mean if the different sectors of the education system monitor the PDG spending activities effectively.

Q19. Below is a list of statements on monitoring the PDG spending activities. Please select the response that best describes your answer to each statement below by ticking one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
Schools can effectively monitor PDG spending						
Regional consortia can effectively monitor PDG spending activities						
Local authorities can effectively monitor PDG spending activities						
Estyn can effectively monitor PDG spending activities						
The Welsh Government can effectively monitor the PDG spending activities						
There is sufficient transparency in the monitoring activities for PDG funded interventions						

Q20. Please provide any additional comments on monitoring the PDG spending activities.

Funding allocations in educational settings

The Pupil Development Grant (PDG) is given directly to schools to support closing the attainment gap for disadvantaged learners. We want to understand if the PDG funding is sufficient to help close the attainment gap.

The following question seeks your views about whether there is adequate funding from the PDG to close the attainment gap between disadvantaged learners and their peers.

Q21. The following question seeks your views about whether there is adequate funding from the PDG to close the attainment gap between disadvantaged learners and their peers. Below are statements on the PDG funding allocations in educational settings. Please select the response which best describes your answer to each statement below by ticking one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
Current PDG funding is sufficient to close the attainment gap						
PDG needs to be increased from current levels to close the attainment gap						
Regardless of the amount of PDG funding, schools cannot close the attainment gap						

Q22. Please provide any additional comments on the allocation of funding to support closing the attainment gap between disadvantaged learners and their peers. Please write your answer in the space below.

Transparency of funding for schools across the education system

Each local authority has their own funding formulae to make a schools delegated core budget. This includes weighting for deprivation, population, and sparsity. Regional consortia are also given deprivation funding to support disadvantaged learners.

Q23. This section of the survey will help us to understand your thoughts on whether there is sufficient transparency around the local authority formulae and the weights for deprivation, population and sparsity which determine the delegated core funding to each school. Below is a list of statements about the calculations and allocation of deprivation funding in educational settings. Please select the response which best describes your answer to each statement below by ticking one box in each row.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Not applicable/ Not known
There is sufficient transparency around the weightings of funding						

delegated to a school's core budget						
There is sufficient transparency around the deprivation element of the funding formulae delegated to a school's core budget						
There is sufficient transparency around how schools utilise deprivation funding as part of core funding from local authorities						
There is sufficient transparency around how regional consortia utilise deprivation funding						
Schools utilise PDG to support the core delegated budget						

Q24. Please provide any additional comments on the funding calculations and allocation of the PDG funding. Please write your answer in the space below.

Q25. Is there anything else that you would like to mention about PDG funding, spending activities, allocation or any other aspect of the PDG that is particularly important for us to understand?

Thank you

Thank you very much for taking the time to contribute to this important survey and share your experiences and insights. It is very much appreciated.

There is an opportunity for you to take part in a semi-structured interview to discuss your thoughts and experiences in more detail. If you would like to take part in this interview please write down your email address in the space below, or alternatively please contact Emma Tiesteel, e-mail: e.tiesteel@bangor.ac.uk and we will arrange for you to take part in the interview as per your convenience. Please let us know via the questions below if you are happy for us to contact you with further information.

Q26. I would like to take part in an interview:

Yes

No

Q27. Please provide your email address:

Welsh version

Demograffeg

Q1. Rhowch deitl eich swydd yn y gofod isod.

Q2. Nodwch nifer y blynyddoedd yr ydych wedi bod yn gweithio yn y system addysg.

- 0 i 5 mlynedd
- 6 i 10 mlynedd
- 11 i 15 mlynedd
- 16 i 20 mlynedd
- 21 i 25 mlynedd
- 26 i 30 mlynedd
- Dros 30 mlynedd

Q3. A ydych chi wedi cael profiad mewn ysgol, yn un o'r rolau canlynol:
addysgu/arweinyddiaeth/asesu/monitro?

- Do
- Naddo

Q4. Ym mha ranbarth mae eich sefydliad wedi'i leoli?

- Gogledd Cymru
- Canolbarth a Gorllewin Cymru
- De Orllewin Cymru
- De Ddwyrain Cymru
- Canolbarth De Cymru
- Cymru gyfan

Q5. Ym mha Sir neu Siroedd yng Nghymru mae eich sefydliad yn gweithio ynddi?

- Cymru gyfan
- Ynys Môn
- Gwynedd
- Conwy
- Sir Ddinbych
- Sir y Fflint
- Wrecsam
- Powys
- Ceredigion
- Sir Benfro
- Sir Gaerfyrddin
- Abertawe
- Castell-nedd Port Talbot
- Pen-y-bont ar Ogwr
- Bro Morgannwg
- Rhondda Cynon Taf
- Merthyr Tudful
- Caerffili
- Blaenau Gwent
- Torfaen
- Sir Fynwy
- Casnewydd
- Caerdydd

Q6. Hoffech chi ddarparu enw'r sefydliad rydych chi'n gweithio iddo?

Targedu'r Grant Datblygu Disgyblion mewn lleoliadau addysgol

Mae'r Grant Datblygu Disgyblion (GDD) yn grant gan Lywodraeth Cymru sy'n anelu at wella canlyniadau i ddysgwyr difreintiedig. Mae swm y cyllid GDD a ddyfernir i ysgolion yn seiliedig ar nifer y disgyblion sy'n gymwys i gael prydau ysgol am ddim (eFSM).

Mae'r adran hon o'r arolwg yn gofyn ichi am eich barn ar sut mae'r GDD wedi'i dargedu ar hyn o bryd i gefnogi dysgwyr difreintiedig ar draws gwahanol sectorau o'r system addysg.

Rydym yn deall efallai nad oes gennych brofiad uniongyrchol o fewn pob sector o'r system addysg, ond byddai'n ddefnyddiol cael mewnwelediad o'ch syniadau a'ch canfyddiadau ar draws yr ystod o leoliadau addysg a restrir isod:

- Ysgolion a gynhelir sy'n darparu addysg feithrin (meithrin; cynradd; 3-16) neu
- Lleoliadau meithrin nas cynhelir a ariennir (e.e. gofal dydd; sesiynol; Cylch Meithrin; gwarchodwyr plant)
- Mae ysgolion cynradd a gynhelir ar gyfer dysgwyr 4-11 oed. Gall y rhain fod yn ysgolion cymunedol/gwirfoddol a reolir neu'n rhai gwirfoddol a gynorthwyr.
- Mae ysgolion canol a gynhelir ar gyfer dysgwyr 3 neu 4-16 neu 19 oed.
- Mae ysgolion uwchradd a gynhelir ar gyfer dysgwyr 11-16 oed neu 11-18 oed.
- Mae ysgolion anghenion addysgol arbennig (AAA) a gynhelir ar gyfer dysgwyr ag anghenion addysgol arbennig.
- Mae Unedau Cyfeirio Disgyblion (UCD) ar gyfer dysgwyr nad ydynt yn mynychu ysgolion prif ffrwd am wahanol resymau (h.y., yn sâl neu wedi'u hanafu, wedi'u gwahardd, sydd ag anawsterau emosiynol ac ymddygiadol neu nad ydynt yn mynychu'n gyson).
- Gall dysgwyr mewn gofal awdurdod lleol (GALI) fod mewn unrhyw leoliad addysgol.

Q7. Mae'r cwestiynau canlynol yn gofyn am eich barn am dargedu'r GDD at ddysgwyr y mae'r grant wedi'i gynllunio i'w cefnogi. Wrth 'targedu'n effeithiol' golygwn fod yna wahanol fathau o leoliadau ysgol sy'n gallu defnyddio incwm GDD ar y dysgwyr y mae'r grant GDD wedi'i gynllunio i'w cefnogi. Isod mae rhestr o ddatganiadau ar ba mor effeithiol y mae'r GDD wedi'i dargedu i gefnogi dysgwyr difreintiedig mewn gwahanol leoliadau addysg. Dewiswch yr ymateb sy'n disgrifio orau eich ateb i bob datganiad drwy dicio un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anhysbys
Mae lleoliadau blynyddoedd cynnar yn targedu'r GDD yn effeithiol i gefnogi dysgwyr difreintiedig						
Mae ysgolion cynradd a gynhelir yn targedu'r GDD yn effeithiol i gefnogi dysgwyr difreintiedig						

Mae ysgolion uwchradd a gynhelir yn targedu'r GDD yn effeithiol i gefnogi dysgwyr difreintiedig						
Mae ysgolion canol yn targedu'r GDD yn effeithiol i gefnogi dysgwyr difreintiedig						
Mae ysgolion AAA yn targedu'r GDD yn effeithiol i gefnogi dysgwyr difreintiedig						
Mae UCD yn targedu'r GDD yn effeithiol i gefnogi dysgwyr difreintiedig						
Mae lleoliadau addysg yn targedu'r GDD yn effeithiol i gefnogi dysgwyr difreintiedig yng ngofal yr awdurdod lleol						

Q8. Rhowch unrhyw sylwadau ychwanegol ar dargedu GDD:

Rhowch unrhyw sylwadau ychwanegol ar dargedu GDD:

Mae gan arweinwyr ysgol rywffaint o ymreolaeth a hyblygrwydd ar sut i ddefnyddio cyllid GDD yn eu hysgol. Rydym am ddeall a ystyrir bod y cymorth a/neu'r ddarpariaeth y maent yn ei roi ar waith gan ddefnyddio GDD yn effeithiol.

Mae'r cwestiynau canlynol yn gofyn i chi a yw ysgolion yn gweithredu darpariaeth a ariennir gan GDD yn effeithiol.

Mae enghreifftiau yn cynnwys:

Mae cyflogi cymorth addysgu gan ddefnyddio cyllid GDD yn cael ei weithredu'n effeithiol i gefnogi anghenion y dysgwyr a dargedir.

Mae rhaglenni llythrennedd a brynir gyda chyllid GDD yn cael eu gweithredu'n effeithiol i gefnogi anghenion y dysgwyr a dargedir.

Mae gweithgareddau lles a brynir gyda chyllid GDD yn cael eu gweithredu'n effeithiol i'r dysgwyr a dargedir.

Q9. Isod mae rhestr o ddatganiadau ar weithredu darpariaeth a ariennir gan GDD mewn gwahanol leoliadau addysg. Dewiswch yr ymateb sy'n disgrifio orau a ydych yn cytuno neu'n anghytuno â phob datganiad isod. Ticiwch un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anghysbys
Mae lleoliadau blynyddoedd cynnar yn gweithredu darpariaeth a ariennir gan GDD yn effeithiol						
Mae ysgolion cynradd a gynhelir yn gweithredu darpariaeth a ariennir gan GDD yn effeithiol						
Mae ysgolion canol yn gweithredu darpariaeth a ariennir gan GDD yn effeithiol						
Mae ysgolion uwchradd a gynhelir yn gweithredu darpariaeth a ariennir gan GDD yn effeithiol						
Mae ysgolion AAA yn gweithredu'r ddarpariaeth a ariennir gan GDD yn effeithiol						
Mae UCD yn gweithredu darpariaeth a ariennir gan GDD yn effeithiol						
Mae lleoliadau addysg gyda dysgwyr yng ngofal yr awdurdod lleol yn gweithredu darpariaeth a ariennir gan GDD yn effeithiol						

Q10. Darparwch unrhyw sylwadau ychwanegol ar weithrediad y ddarpariaeth a ariennir gan GDD:

Effaith y Grant Datblygu Disgyblion ar ddysgwyr

Mae'r GDD wedi'i gynllunio i liniaru rhai o'r rhwystrau ychwanegol y gall dysgwyr o gefndiroedd difreintiedig eu hwynebu. Hoffem ddeall eich barn ynghylch a yw strategaethau neu ddarpariaeth a ariennir gan y GDD yn cael effaith gadarnhaol ar y dysgwyr difreintiedig y mae'r grant wedi'i gynllunio i'w cefnogi.

Wrth sôn am 'effaith', rydym yn golygu ystod o effeithiau sy'n cefnogi dysgwyr yn gadarnhaol i oresgyn y rhwystrau ychwanegol y gall dysgwyr o gefndiroedd difreintiedig eu hwynebu.

Q11. Isod mae rhestr o ddatganiadau ar wahanol effeithiau y gall strategaethau neu ddarpariaeth a ariennir gan GDD eu cronni. Dewiswch yr ymateb sy'n disgrifio orau p'un a ydych yn cytuno neu'n anghytuno â phob datganiad isod. Ticiwch un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anhysbys
Sgiliau cymdeithasol ac emosïynol						
Ymgysylltiad rhieni						
Cyrhaeddiad						
Cynhwysiad o weithgareddau allgyrsiol						
Presenoldeb						
Iechyd meddwl a llesiant						

Q12. Darparwch unrhyw sylwadau ychwanegol ar effaith strategaethau neu ddarpariaeth a ariennir gan GDD:

Ffocws y Grant Datblygu Disgyblion

Mae gan arweinwyr ysgol ryw faint o ymreolaeth a hyblygrwydd ar sut i ddefnyddio cyllid GDD yn eu hysgol. Hoffem ddeall lle y credwch y dylid canolbwyntio cyllid GDD, a pha ddulliau y credwch yw'r defnydd mwyaf effeithiol o adnoddau.

Mae'r cwestiwn canlynol yn gofyn am eich barn ynghylch ble y dylid canolbwyntio gwariant GDD.

Mae ymagweddau ysgol gyfan yn golygu bod darpariaeth a ariennir gan GDD ar gael i holl ddysgwyr y lleoliad.

Mae ymagweddau penodol i ddysgwyr yn golygu darpariaeth sy'n canolbwyntio ar ddysgwyr sy'n cael prydau ysgol am ddim yn unig.

Mae ymagweddau llesiant ehangach yn golygu darpariaeth sy'n canolbwyntio ar iechyd a lles dysgwyr sy'n cael prydau ysgol am ddim ac nad yw'n gysylltiedig â chyrhaeddiad.

Mae gwariant sy'n seiliedig ar wybodaeth penaethiaid yn golygu y dylai'r ddarpariaeth gael ei theilwra i'r garfan.

Q13. Isod mae rhestr o ddatganiadau ar ffocws gwariant GDD yn y system addysg. Dewiswch yr ymateb sy'n disgrifio orau eich ateb i bob datganiad isod drwy dicio un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anghysbys
Dylai gwariant GDD ganolbwyntio ar ddulliau ysgol gyfan						
Dylai gwariant GDD ganolbwyntio ar ymyriadau penodol i ddisgyblion						
Dylai gwariant GDD ganolbwyntio ar ddulliau llesiant ehangach						
Dylai gwariant GDD ganolbwyntio ar wybodaeth leol y pennaeth o'i garfan						

Q14. Rhwch unrhyw sylwadau ychwanegol ar ffocws y ddarpariaeth GDD:

Effeithiolrwydd cymhwysedd i gael prydau ysgol am ddim fel ffordd o nodi dysgwyr sydd dan anfantais

Nod y GDD yw targedu dysgwyr difreintiedig. Y mesur dirprwyol presennol ar gyfer hyn yw cymhwysedd ar gyfer prydau ysgol am ddim (e-FSM). Nod yr adran hon o'r arolwg yw canfod eich barn am effeithiolrwydd cymhwysedd ar gyfer prydau ysgol am ddim fel mesur dirprwyol o anfantais.

Mae'r cwestiwn canlynol yn gofyn i chi pa mor effeithiol yw'r hawl i brydau ysgol am ddim (e-FSM) fel mesur o anfantais ymhlith dysgwyr.

Q15. Isod mae rhestr o ddatganiadau ar y dangosyddion anfantais i ddysgwyr. Dewiswch yr ymateb sy'n disgrifio orau eich ateb i bob datganiad isod drwy dicio un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anhysbys
Mae hawl i brydau ysgol am ddim (e-FSM) yn ddangosydd effeithiol o anfantais ymhlith dysgwyr						
Mae angen ystyried mesurau anfantais eraill i nodi dysgwyr difreintiedig						

Q16. Pa ddangosyddion eraill ydych chi'n meddwl y gellid / y mae angen eu hystyried i helpu i nodi dysgwyr difreintiedig? Ysgrifennwch eich ateb yn y gofod isod.

Addasrwydd mesurau a systemau ar gyfer monitro gweithgareddau ac effeithiau GDD.

Mae'r adran hon o'r arolwg yn gofyn ichi am y mesurau effaith a'r systemau ar gyfer monitro'r strategaethau neu'r ddarpariaeth a ariennir gan GDD. Mae gan ysgolion ymreolaeth a hyblygrwydd i benderfynu pa strategaethau neu ddulliau y maent yn eu defnyddio i gefnogi dysgwyr difreintiedig ac nid oes dull y cytunir arno'n gyffredin i fonitro effeithiau. Mae ymyriadau neu strategaethau wedi'u teilwra i bob lleoliad a gall ysgolion ddefnyddio'r data sydd fwyaf perthnasol i'r ymyriad neu'r strategaeth a ddefnyddir. Rydym eisieu deall a yw'r data a gesglir ar lefel ysgol a'r gweithgareddau monitro yn ddigonol i ddangos effeithiau cyllid GDD.

Mae'r cwestiwn canlynol yn gofyn ichi am y mesurau effaith presennol ar gyfer asesu effaith cymorth a darpariaeth a ariennir gan GDD mewn lleoliadau addysgol.

Q17. Isod mae rhestr o ddatganiadau ar fonitro gweithgareddau gwariant GDD. Dewiswch yr ymateb sy'n disgrifio orau eich ateb i bob datganiad isod drwy dicio un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anhysbys
Mae mesurau effaith yn briodol yn seiliedig ar yr ymyriad neu'r strategaeth(au) a ddefnyddir						
Mae angen sefydlu dulliau casglu data						

mwy cadarn i fesur yr effeithiau ar ddysgwyr difreintiedig						
Mae angen i effeithiau fod yn uniongyrchol gysylltiedig â chyrhaeddiad addysgol dysgwyr						
Mae angen i effeithiau fod yn gysylltiedig ag ystod o ganlyniadau (h.y., iechyd, llesiant)						
Mae digon o dryloywder o ran effeithiau mewn perthynas ag ymyriadau a gweithgareddau a ariennir drwy GDD						

Q18. Rhowch unrhyw sylwadau ychwanegol ar y mesurau effaith ar gyfer strategaethau neu ddarpariaeth a ariennir gan GDD.

Mae'r cwestiwn canlynol yn gofyn ichi am fonitro gwariant GDD yn effeithiol mewn lleoliadau addysgol. Yr hyn a olygwn wrth hyn yw os yw gwahanol sectorau'r system addysg yn monitro gweithgareddau gwariant GDD yn effeithiol.

Q19. Isod mae rhestr o ddatganiadau ar fonitro gweithgareddau gwariant GDD. Dewiswch yr ymateb sy'n disgrifio orau eich ateb i bob datganiad isod drwy dicio un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anhysbys
Gall ysgolion fonitro gwariant GDD yn effeithiol						
Gall consortia rhanbarthol fonitro gweithgareddau gwariant GDD yn effeithiol						
Gall awdurdodau lleol fonitro gweithgareddau gwariant GDD yn effeithiol						
Gall Estyn fonitro gweithgareddau gwariant GDD yn effeithiol						

Gall Llywodraeth Cymru fonitro gweithgareddau gwariant GDD yn effeithiol						
Mae digon o dryloywder yn y gweithgareddau monitro ar gyfer ymyriadau a ariennir gan GDD						

Q20. Darparwch unrhyw sylwadau ychwanegol ar fonitro gweithgareddau gwariant GDD.

Dyraniadau ariannu mewn lleoliadau addysgol

Rhoddir y Grant Datblygu Disgyblion (GDD) yn uniongyrchol i ysgolion i gefnogi cau'r bwllch cyrhaeddiad ar gyfer dysgwyr difreintiedig. Rydym am ddeall a yw'r cyllid GDD yn ddigonol i helpu i gau'r bwllch cyrhaeddiad.

Mae'r cwestiwn canlynol yn gofyn am eich barn ynghylch a oes cyllid digonol gan y GDD i gau'r bwllch cyrhaeddiad rhwng dysgwyr difreintiedig a'u cyfoedion.

Q21. Mae'r cwestiwn canlynol yn gofyn am eich barn ynghylch a oes cyllid digonol gan y GDD i gau'r bwllch cyrhaeddiad rhwng dysgwyr difreintiedig a'u cyfoedion. Isod mae datganiadau ar ddyraniadau cyllid GDD mewn lleoliadau addysgol. Dewiswch yr ymateb sy'n disgrifio orau eich ateb i bob datganiad isod drwy dicio un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anhysbys
Mae cyllid GDD presennol yn ddigon i gau'r bwllch cyrhaeddiad						
Mae angen cynyddu GDD o'r lefelau presennol i gau'r bwllch cyrhaeddiad						
Waeth beth fo swm y cyllid GDD, ni all ysgolion gau'r bwllch cyrhaeddiad						

Q22. Darparwch unrhyw sylwadau ychwanegol ar ddyrannu cyllid i gefnogi cau'r bwlch cyrhaeddiad rhwng dysgwyr difreintiedig a'u cyfoedion. Ysgrifennwch eich ateb yn y gofod isod.

Tryloywder cyllid ar gyfer ysgolion ar draws y system addysg

Mae gan bob awdurdod lleol ei fformiwlâu ariannu eu hunain i wneud cyllideb graidd ddirprwyedig i ysgolion. Mae hyn yn cynnwys pwysoli ar gyfer amddifadedd, poblogaeth a theneurwydd poblogaeth. Mae consortia rhanbarthol hefyd yn cael cyllid amddifadedd i gefnogi dysgwyr difreintiedig.

Q23. Bydd yr adran hon o'r arolwg yn ein helpu i ddeall eich barn ynghylch a oes digon o dryloywder ynghylch fformiwlâu awdurdodau lleol a'r pwysau ar gyfer amddifadedd, poblogaeth a theneurwydd poblogaeth sy'n pennu'r cyllid craidd dirprwyedig i bob ysgol. Isod mae rhestr o ddatganiadau am y cyfrifiadau a dyraniad cyllid amddifadedd mewn lleoliadau addysgol. Dewiswch yr ymateb sy'n disgrifio orau eich ateb i bob datganiad isod drwy dicio un blwch ym mhob rhes.

	Anghytuno'n Gryf	Anghytuno	Ddim yn cytuno nac yn anghytuno	Cytuno	Cytuno'n gryf	Amherthnasol/ Anghysbys
Mae digon o dryloywder ynghylch pwysoli cyllid a ddirprwyir i gyllideb graidd ysgol						
Mae digon o dryloywder ynghylch elfen amddifadedd y fformiwlâu ariannu a ddirprwyir i gyllideb graidd ysgol						
Mae digon o dryloywder ynghylch sut mae ysgolion yn defnyddio cyllid amddifadedd fel rhan o gyllid craidd gan awdurdodau lleol						
Mae digon o dryloywder ynghylch sut mae consortia rhanbarthol yn defnyddio cyllid amddifadedd						
Mae ysgolion yn defnyddio GDD i						

gefnogi'r gyllideb ddirprwyedig graidd						
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Q24. Darparwch unrhyw sylwadau ychwanegol ar y cyfrifiadau ariannu a dyraniad y cyllid GDD. Ysgrifennwch eich ateb yn y gofod isod.

Q25. A oes unrhyw beth arall yr hoffech ei grybwyll am gyllid GDD, gweithgareddau gwariant, dyraniad neu unrhyw agwedd arall ar y GDD sy'n arbennig o bwysig i ni ei ddeall?

Diolch

Diolch yn fawr iawn am gymryd yr amser i gyfrannu at yr arolwg pwysig hwn a rhannu eich profiadau a'ch mewnwediadau. Mae'n cael ei werthfawrogi'n fawr iawn.

Mae cyfle i chi gymryd rhan mewn cyfweiliad lled-strwythuredig i drafod eich syniadau a'ch profiadau yn fwy manwl. Os hoffech gymryd rhan yn y cyfweiliad hwn ysgrifennwch eich cyfeiriad e-bost yn y gofod isod, neu fel arall cysylltwch ag Emma Tiesteel, e-bost: e.tiesteel@bangor.ac.uk a byddwn yn trefnu i chi gymryd rhan yn y cyfweiliad fel sy'n gyfleus i chi. Rhowch wybod i ni trwy'r cwestiynau isod os ydych chi'n hapus i ni gysylltu â chi gyda gwybodaeth bellach.

Q26. Hoffwn gymryd rhan mewn cyfweiliad:

Ie

Na

Q27. Darparwch eich cyfeiriad e-bost os gwelwch yn dda:

Appendix C – Interview schedule



1. Introduction:

Thank you for agreeing to take part in this interview. Before I start, I want you to know that you don't have to answer any of the questions if you don't want to. If at any point you want to stop the interview just say so, or if you need to take a break, please just ask.

I know that we are going to be talking about some complex issue and there are many layers to PDG, our motive for this research is to understand your attitudes and perspective to how the PGD grant is used, targeted, outcomes and transparency. We will then report back to the Welsh Government with the hope to better support some of the most disadvantaged learners in Wales, with the ultimate goal of supporting the narrowing of the attainment gap.

2. Warm up:

Can you give me a little background to how you became to do your current role?

What is your experience with PDG?

Probe

- How long?
- Previous experience?
- Any in-school decision making responsibilities?

3. Themes:

4. Targeting:

Does the PGD effectively target learners who are disadvantaged

Are there ways in which some learners miss out of support because of eFSM as a measure of deprivation

-What about learners in persistent poverty, or that live in very deprived areas where there are limited opportunities/ services?

- Which learners?
- How many?

5. Implementation

How are schools using the PDG money?	-Types of strategies (whole school, targeted) e.g., Literacy, Maths, Wellbeing, etc.
How do they plan provision using PDG funding?	-What might affect headteachers decision making process?
Is this effective / responsive to learners needs?	-Evidence informed practice, information from other schools.

6. Outcomes:

Is there sufficient transparency between outcomes from PDG activities and spending?	-What outcomes?
How could there be better monitoring of outcomes?	-How might this look in practice? -Lack of services (CHAMS, SSD)
What are the difficulties faced by school leaders when trying to close the attainment gap with PDG	-Financial pressure (cost of living/ change in welfare system)

7. Monitoring:

Are schools able to monitor their PDG spending and show evidence of effectiveness?	-How do they know what they are doing works?
Are the local authorities or local consortia able to monitor and challenge school leaders around PDG spending?	-How is this reported to the wider education system?
Do ESTYN effectively monitor school spending around PDG?	-Could this be reported more explicitly?

8. Wider resource allocation:

Are local authorities supporting deprived learners?	
Are the local consortia supporting deprived learners?	-How/ What -How / What

Part of a schools funding allocation from the local authority incorporates deprivations calculations:

Is there sufficient transparency around local authorities' calculation of this amount?

-Delegated budgets

Is there sufficient transparency around school use of this allocated deprivation funding?

Is there sufficient monitoring of this element of deprivation funding?

-Is it difficult to track effectiveness of the funding?

9. Future needs:

What needs to be done to support deprived learners in Wales?

-More money?

-Stronger focus on outcomes?

-Integrated approach with wider public services?

Would you like to add anything else that you think is important for us to understand?

10. End:

Thank you for your time today, it has been very valuable to discuss this with you. If at any point you want to withdraw your data, please just email me.

Appendix D – Table of characteristics of the publications included in the rapid review

Citation (Nation) and Document Type	Study Details	Key Findings	Evidence of Impact	Evidence of Value for Money
<p>Morris & Dobson (2021)</p> <p>England</p> <p>Peer reviewed article</p>	<p>Research type: Qualitative</p> <p>Study design: In depth scoping exercise and semi structured interviews. Thematic analysis applied.</p> <p>Phenomenon of interest: Semi structured interviews to examine school leaders' perceptions, approaches, engagement, and experiences relating to the PP policy. The instrument also investigates the challenges regarding decision making and the efficiency of PP spending.</p> <p>Sample of participants: 21 school leaders, LA representatives, and governors.</p>	<p>Participants identified that their spending was predominately associated with the wider consequences of poverty e.g., speech and language, parental engagement, social and emotional. School leaders were faced with the need to consider the intersectionality of poverty and BAME backgrounds, pupils with SEN, behavioural problems, and those with English as a second language. Leaders identified the lack of spending in community and wider support services. This means that they were having to utilise equity funding for the lack of services traditionally provided in the community. Leaders acknowledge the lack of monitoring of the equity funding.</p>	<p>Raises questions on the impact of PP on learner outcomes with spending being used to tackle wider inequalities associated with economic, social, or cultural capital.</p>	<p>Based on the results, the funding introduced to schools is not adequate to improve academic attainment at its current rate.</p>
<p>1 Weir & Kavanagh (2018)</p> <p>Ireland</p>	<p>Research type: Mixed methods.</p> <p>Study design: Longitudinal repeated measures and surveys with relevant stakeholders. The Drumcondra Sentence Reading Test (DSRT) and</p>	<p>There is a need to focus on early intervention with regards to educational attainment. It is necessary to consider the wider context to the attainment gap.</p>	<p>Schools in the School Support Programme (SSP) Band 1 and Band 2 had consistent increases in average achievement since the introduction of SSP. Reading and mathematics scores for traveller pupils were lower</p>	<p>The DEIS policy has evidence of raising the attainment gap, but no attempts were made to link</p>

<p>Report by Educational Research Centre</p>	<p>a shortened version of the Drumcondra Primary Mathematics Test- Revised (DPMT-R) were used to measure learner progress from 2007-2016.</p> <p>Phenomenon of interest: Evaluation of DEIS for post primary learners.</p> <p>Sample of participants: Data was collected from national testing, surveys completed by parents, learners, and teachers. Outcome measures were compared between learners who attended DEIS schools and learners in non-DEIS schools.</p>		<p>than those of non-travellers at all grade levels.</p> <p>Family structure was associated with achievement. Parental support indicated higher achieving levels in English and mathematics. Overall performance scale gaps decreased in 2002 from 10.5 to 4.6 points in 2016 gap between DEIS and non-DEIS schools decreased in English and mathematics. Significant gaps in retention of learners between DEIS schools and non-DEIS schools (82.3% and 93.2% for DEIS and non-DEIS schools).</p>	<p>outcomes to spending.</p>
<p>Craske (2018) England Peer reviewed article</p>	<p>Research type: Mixed methods</p> <p>Study design: Qualitative semi structured interviews. Case study design, documents and tracking documents were analysed.</p> <p>Phenomenon of interest: Research into how school leaders prioritise PP in relation to their school environment. This paper also investigated the school learners on disadvantage.</p> <p>Sample of participants: Two school leaders and four school teachers.</p>	<p>Little guidance from central government with staff having to demonstrate impact with the accountability pressures without guidance from central government.</p> <p>The impact is difficult to measure, especially the softer outcomes. The way the PP is funded means that schools are not able to offer secure employment. This can lead to high staff turnover. PP puts a focus on teaching staff when the problem of social deprivation is wider than the school context.</p>	<p>Need to consider measuring the softer outcomes.</p>	<p>N/A</p>
<p>Pye et al. (2017) Wales</p>	<p>Research type: Mixed methods</p>	<p>Schools considered that PDG aimed to tackle 'disadvantage' rather than 'financial</p>	<p>An improvement across all areas was noted however, the standards across</p>	<p>N/A</p>

<p>Report</p>	<p>Study design: Survey instrument, impact analysis, case study and focused interviews.</p> <p>Phenomenon of interest: Evaluation of the impact of PDG between 2014 and 2017 (LAC element and Early Years element not included in the evaluation). The schools' surveys were conducted in 2014 to gather in-depth evidence regarding the initiatives funded via PDG.</p> <p>Sample of participants: 201 schools completed the survey; 14 schools participated in the follow up case study visits. The sample for the impact analysis was the National Pupil Database (NPD). The overall number of interviews is not stated.</p>	<p>deprivation'. Rather than using just the FSM status alone, the schools used a wider range of indicators and personal knowledge of pupils and families to identify those in need of support. To target disadvantaged learners, schools reported only using their own, or informal sources of evidence, and not external or formal evidence.</p> <p>Emphasis was put on the importance of understanding the family's background and current circumstances to identify if the learner needs support via conducting home visits.</p> <p>The LA was considered a valuable source of advice on the administration of, and evidence base for, the PDG.</p> <p>Regarding the effectiveness of the PDG, participants stated that it would be valuable to know whether schools can incorporate the PDG funding in their long-term planning.</p> <p>Effective cluster initiatives included consortia establishing professional learning communities (PLCs) with themes such as closing the attainment gap and school leaders pooling PDG to fund members of support staff to work across the region. Via establishing a partnership between schools and sharing effective practice has led to several effective approaches for example, a collective funding for an Engagement Worker to work with families in need, the development of the 'Project Hero' initiative to help learners transition to local secondary schools and a consistent literacy and</p>	<p>schools and improvements made to help reduce the attainment gap between pupils from disadvantaged backgrounds and others from different backgrounds did not yield an immediate spike in results.</p> <p>Between 2014 and 2016, the PDG achievement scores improved by 8% with an achieved score of 28% in 2014 and 36% in 2016. Also, the overall school population improved from 47% to 66%. Nonetheless, these results provide only a decontextualised account of the statutory requirements from WG. Closing the attainment gap is a long-term goal.</p>	
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		<p>numeracy strategy that was taught and embedded across the curriculum.</p> <p>The size of the school and the level of the attainment gap were important factors; schools with a large gap focused on the underachieving learners whilst the ones with a smaller gap focused on the whole school and More Able and Talented (MAT) learners.</p> <p>One of the most common uses of the PDG was to fund TAs to deliver one-to-one or small group activities to support classroom learning. Other interventions implemented by schools to overcome additional barriers that prevent learners from disadvantaged backgrounds to achieve their full potential were the following: focus on the development of learners' literacy, numeracy and learning skills to improve attainment, strategies for deploying staff effectively, improving attendance and behaviour, engage parents and carers of disadvantaged learners, use of to engage learners and their parents, early targeting, provision of an alternative curriculum and development and support of social and emotional skills of disadvantaged learners.</p>		
<p>Kelleher & Weir (2017)</p> <p>Ireland</p> <p>Report</p>	<p>Research type: Not mentioned. Examination of data from two different academic years (2009/2010 and 2014/2015).</p> <p>Study design: Not mentioned. Data was retrieved from Weir and McAvinue (2012) and it was re-</p>	<p>The analyses of junior class sizes revealed a high level of implementation of the maximum class size policy under DEIS in 2014/15. Furthermore, it demonstrated a class size advantage for junior classes in Band 1 schools over junior classes in urban non-DEIS schools.</p>	<p>In 2014/2015, the junior classes in Band 1 schools were considerably smaller than junior classes in non-DEIS schools. This confirms the positive impact of class size policy under DEIS. There is evidence of some erosion of positive discrimination</p>	<p>There is evidence that the DEIS scheme is effective, but no attempt was made to evaluate it along resource allocation.</p>

	<p>analysed. The authors also included the data for students in mainstream classes who are from the Traveller community and students in mainstream classes who have SEN pupils.</p> <p>Phenomenon of interest: The study examines the implementation of DEIS in terms of the extent to which the maximum class sizes made possible by the programme (20 students in junior classes and 24 students in senior classes) was achieved in junior and senior classes in the most disadvantaged DEIS urban primary schools (Band 1).</p> <p>Sample of participants: 187 DEIS schools (n=1,969 Band 1 classes).</p>	<p>In 2014/15, the second class in senior schools that enrol second classes, represented 13.4% (25) of schools in DEIS Band 1. Next, the vertical 'all-through' schools (i.e., schools enrolling junior infants through sixth class) represented 60.5% (113) of all urban Band 1 schools. The greatest percentage of smaller classes were found at junior infant level. The findings showed that third classes were targeted over second classes and first classes for reduced class sizes.</p>	<p>since comparable analyses were undertaken on the size of classes in Band 1 schools in 2009/10.</p>	
<p>Kavanagh & Weir (2018)</p> <p>Ireland</p> <p>Report</p>	<p>Research type: Longitudinal</p> <p>Study design: DSRT, a shortened version of the DPMT-R, a Pupil Questionnaire, a Parent Questionnaire, and a Pupil Information Form (for completion by teachers).</p> <p>Phenomenon of interest: Formal evaluation of DEIS at primary level.</p> <p>Sample of participants: The schools in the sample are a mix of junior, senior, and vertical schools. In 2007 the sample contained 120 schools. In 2016, 118 schools</p>	<p>Since the introduction of DEIS, the between-school variance in reading and mathematics has decreased at each testing. At the pupil level, the findings suggested a significant association between the home background characteristics and home climate variables (e.g., the parents' employment status and number of books in the household), and the pupil achievement in both reading and mathematics.</p> <p>Pupil attitudes and expectations were significantly associated with achievement; the results showed that learners who enjoyed reading and mathematics and learners who had high educational expectations were outperforming their peers.</p>	<p>The differences in pupil achievement outcomes are due to differences between pupils, here included the variation in backgrounds and home environments. There is a need to develop interventions that focus on both, the home domain and at school. Since the introduction of DEIS, an increase in the average pupil achievement was noted. Nonetheless, when comparing the achievement of learners in non-SSP schools with those in SSP schools, substantial gaps remain between the two types of learners. Lastly, poverty remains the largest factor of educational outcomes.</p>	<p>There is evidence that the DEIS scheme is effective, but no attempt was made to evaluate it along with resource allocation.</p>

	<p>participated in the study (n=70 Band 1 schools and n=48 Band 2 schools). In 2016, 98 schools had pupils at the Second-class level, and 111 schools had Third, Fifth and Sixth class pupils.</p>	<p>The parental involvement variable, chiefly parents who had high expectations for the learners' educational attainment and parents who read frequently to their children, had significantly mean scores that the learners whose parents did not read to them or had had high expectations. Another variable that was significantly associated with pupil achievement in reading but not in mathematics was the language of the home.</p>		
<p>Kavanagh et al. (2017)</p> <p>Ireland</p> <p>Report by Educational Research Centre</p>	<p>Research type: Mixed methods Longitudinal Study</p> <p>Study design: DSRT, a shortened version of the DPMT-R, a Pupil Questionnaire, a Parent Questionnaire, a Pupil Information Form, and focus group interviews.</p> <p>Phenomenon of interest: Evaluation of DEIS via examination of changes in student achievement in English reading and mathematics and attitudes in urban schools since 2007.</p> <p>Sample of participants: The sample consisted of 120 schools in 2007 (71 schools were in Band 1 and 49 were in Band 2). In 2010 and 2013 the sample consisted of 119 schools. In 2016 the overall number of schools in the sample was 118 schools (70 schools in Band 1 and 48 schools in Band 2). In 2007, approximately</p>	<p>The results suggested a small increase in average scores from 2013 and 2016 in pupil achievement in reading and mathematics. Overall, the results are smaller than the increases noted between 2010 and 2013. From the baseline data collected in 2007 to 2016, more significant gains were observed in mathematics than in reading at all grade levels. When comparing the results between Band 1 and Band 2 schools, Band 2 schools had greater achievements at all grade levels.</p> <p>Regarding the pupil's attitudes and achievements, i.e., learners' experiences of, and attitudes towards, school and learning, at all grade levels, the 2016 round of testing yielded the most favourable attitudes towards school, reading and mathematics in comparison to other years. Also, since 2007, aspirations and expectations from educational attainment such as aspiration to attend college or university, has increased significantly.</p>	<p>Even if the improvements in achievement have increased since 2007, it is difficult to draw conclusions about whether the achievement gaps between Band 1 and Band 2 schools have narrowed over time. Furthermore, due to a lack of a control group, it is unclear as to whether the improvements are attributed to SSP.</p>	<p>There is evidence that the DEIS scheme is effective, but no attempt was made to evaluate it along resource allocation.</p>

	<p>11,000 pupils participated in testing, while in 2010, 2013 and 2016 approximately 16,000 pupils participated in testing. The learners of interest attended Second, Third, Fifth and Sixth class.</p> <p>The questionnaire was completed by 221 principals (131 were in Band 1 schools and 88 were in Band 2 schools) and a total of 163 principals attended the focus groups.</p>	<p>When putting the achievement and attitudes of the learners in SSP schools in the context of national trends, it was noted that they were similar in magnitude to those observed in non-SSP schools.</p> <p>The results yielded via the questionnaire aimed at principals demonstrated that most principals agreed that there have been gains in both reading and mathematics especially in junior classes and amongst lower achieving pupils. The principals agreed that the most important determinants of gains in achievement were the introduction of specialised literacy and numeracy programmes, especially between 2007 and 2013, the practice of target setting for both reading and mathematics and the reduced class size.</p> <p>The focus groups further demonstrated that the key determinants in accomplishing gains were the introduction of literacy and numeracy programmes as well as an increased emphasis on planning and target setting in these areas. The SSP funding has been used to invest in resources such as ICT, school library books, support material for mathematics and individual levelled readers for pupils of differing abilities. Other themes that emerged from the discussions were the value of small class sizes, the significant improvement of low achieving learners in reading and mathematics. According to the findings, the latter improvement came at the expense of high-achieving learners. The issues identified by the principals were the fact that the differential progress rates</p>		
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		<p>increased pupil: teacher ratios in senior classes, and the large increase in class sizes between junior classes and senior classes. Maintaining the same level of improvement in junior grades proved to be more difficult due to larger class sizes, lower level of support and an increased level of difficulty of the curriculum.</p> <p>Principals considered an increase of home support and parental involvement, improvement in Learning Support services for low-achieving children, improved attendance, teaching literacy and numeracy across the curriculum etc., as factors that were of equal importance in maintaining and improving the rate of improvement.</p>		
<p>Thornton (2021) Scotland Report</p>	<p>Research type: Quantitative</p> <p>Study design: Survey instrument</p> <p>Phenomenon of interest: Explore the headteachers' views and experiences relating to the 2019/20 academic year.</p> <p>Sample of participants: 420 headteachers</p>	<p>Most of the respondents felt that they understood the challenges faced by disadvantaged learners and they felt that the approach to accomplish equity in education was embedded within their school community. To achieve equity, most of the schools have focused on the learners or families who were experiencing socio-economic deprivation. Since the school closure, headteachers noticed new circumstances such as risk of losing home, changes in income, increase in families experiencing poverty, employment insecurities that affected the need of support. The circumstances affected the learner' and the families' health and wellbeing, here included emotional and mental health. They have also had a negative impact on the learner's ability to engage with remote learning. Other factors hindering the learners'</p>	<p>Based on the headteachers' responses, it can be stated that the ASF support continues to deliver positive impacts yielding positive trends in closing the poverty-related gap in literacy, numeracy and health and wellbeing. Most of the headteachers (88%) expect further improvement in closing the attainment gap in the next five years. Yet, schools have faced unique, Covid-19 related challenges during the 2019/20. For example, Covid-19 and school building closures, had a negative impact on headteachers' progress in closing the poverty-related attainment gap. This was due to a lack of face-to-face contact with learners, challenges supporting learners and their families' wellbeing and the impact of the</p>	<p>Not mentioned.</p>

		<p>ability to engage with remote learning were lack of digital skills and digital access.</p> <p>The approaches developed by schools to ensure equity were mostly related to supporting remote learning. The schools provided support for learning at home (here included digital resources and a refined pedagogical approach), they put emphasis on learners' and families' wellbeing via regular 'check-ins' and offering mental health and emotional support. Equally they focused on tackling poverty and deprivation via supporting access to financial support, and support with food and clothing. Engaging with families and communities was an approach adopted by most of the schools as a means of closing the poverty-related attainment gap.</p> <p>The majority of headteachers considered themselves as being very good or good at using data to inform their approach and they were positive that they had the knowledge to measure the impact of their approaches. Furthermore, most schools considered the support received from PEF beneficial in developing the staff skills and knowledge in using data and evaluation.</p> <p>Concerning the views on the impact of PEF supported approaches to aid in narrowing the poverty-related attainment gap, the results show that most of the schools i.e., 90% have seen an improvement. Headteachers have seen a positive improvement in terms of teaching and staffing resources (staffing input</p>	<p>pandemic on learners' and families' mental health.</p> <p>According to the survey data, the following headteachers are most likely to see improvements in narrowing the attainment gap:</p> <ul style="list-style-type: none"> • who have developed approaches to ensure equity across the school community • who understand the struggles faced by learners and families affected by poverty • who acknowledge the positive impact of ASF in developing staff data and evidence skills • who promote collaborative working • who are efficient in measuring the progress and impact of embedded approaches. <p>In the current context, factors considered of importance by headteachers were: maintaining communication with learners and families, gaining knowledge of the challenges affecting learners and families (here included an emphasis put on mental health and wellbeing), and ensuring a shared ethos and values across the school communities.</p>	
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		<p>being a key driver), focus on health and wellbeing and their ability to develop approaches suitable to their schools. The points raised by the headteachers who have not seen improvements in closing the attainment gap were the lack of face-to-face contact, the impact of the pandemic and pressure on resources.</p> <p>Most of the respondents indicated that due to PEF, they have seen an increase in collaborative working (e.g., collaboration with families and communities, and other schools in their LA) in their school.</p> <p>More than half of the headteachers (76%) considered that they received enough support to develop and implement the school plan for the PEF.</p> <p>The two open ended questions were created to gather the challenges the headteachers' faced during school closures, and how they overcame them. The results demonstrated that more than a half of headteachers found it difficult to engage with the learners and their families due to a lack of face-to-face contact. Other challenges headteachers had to overcome were: to respond to learners and their families' wellbeing, safety, and mental health, and to adjust to remote learning while making sure quality support was provided.</p>		
<p>Education Scotland (2022)</p> <p>Scotland</p>	<p>Research type: Mixed methods</p>	<p>Head teachers reported a wide range of activities being used to support learners. There was good support from the LAs and an integrated approach was used. Difficulties</p>	<p>PEF-funded interventions in literacy and numeracy were noted by a significant number of schools as having a positive impact on the</p>	<p>Not mentioned.</p>

<p>Report</p>	<p>Study design: Interviews with school leaders and data collated at school level.</p> <p>Phenomenon of interest: Report of effective PEF.</p> <p>Sample of participants: Schools were identified by the LA in relation to effective PEF usage.</p>	<p>with the procurement of services leading to delays and costly interventions were mentioned by head teachers. LAs developed multi supplier framework sectioned into themes:</p> <ul style="list-style-type: none"> • Improvement in attainment, particularly in literacy and numeracy • Leadership for All • Improvement in children and young people’s health and well-being • Improvement in employability skills and sustained, positive school-leaver destinations for all young people • Parental Engagement and Involvement <p>Time and cost were issues with the procurement process.</p> <p>Effective strategies:</p> <p>Monitoring: The LAs have developed data collection tools mainly focused on attainment with some elements of PEF. LAs and attainment advisors offer training and support around the poverty-related attainment gap. LAs also have training themselves on the poverty-related attainment gap. The LAs collate finding in a report and this is used to share good practice. Some councils write impact reports. School must report on PEF in standards and quality reports (SQRs).</p> <p>Sharing practice: With LA structures the headteachers were able to meet and share practice with other headteachers. This has developed cluster working and joint working. Stakeholder</p>	<p>attainment of children and young people experiencing socio-economic disadvantage.</p> <p>Schools were also able to link data to improved increased engagement with families, improved attainment, increased awareness of poverty-related barriers, reduced costs associated with school, improvements in health and well-being and increased staff capacity.</p>	
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		involvement is championed.		
2 Weir & Kavanagh (2018) Ireland Report by Educational Research Centre	<p>Research type: Quantitative longitudinal study</p> <p>Study design: Multilevel modelling approaches</p> <p>Phenomenon of interest: Evaluation of the DEIS programme at post primary level via examining trends in achievement between 2002 and 2017, and how student achievement relates to medical card possession and gender to determine the extent to which a social context effect operates in schools. Student achievement was evaluated in terms of English and mathematics results in the JCE and compared to non-DEIS schools.</p> <p>Sample of participants: Post primary learners in DEIS schools (203 post primary schools 2006/07, 185 schools by 2016/17 and 199 schools in 2017)</p>	<p>The analysis found a statistically significant upward trend in achievement in the JCE between 2002 and 2016 across all schools and upward trends between 2002- 2016 for individual JCE subjects in English and mathematics. There were variances in JCE results when comparing DEIS schools with non-DEIS schools. The trends in DEIS schools showed increasing Overall Performance Score (OPS) results, and a greater achievement in mathematics.</p> <p>The medical card possession rates have increased in both DEIS and non-DEIS schools since the introduction of DEIS funding programme. Concerning the gender, it was found that girls obtained better results in English and mathematics in both DEIS and non-DEIS schools. Next, a lower proportion of student in DEIS schools in 2016 than in 2007 took English and mathematics at Foundation level (13% decrease). Nonetheless, there was an increase in learners in DEIS schools who took both subjects at Higher level. This could be due to an increased confidence in academic skills amongst learners and higher expectations from their teachers.</p>	Progress continues to be made by students in DEIS post-primary schools. This signifies that the achievement and attainment gap between DEIS and non-DEIS schools continues to narrow. Even so, the authors recommend further monitoring of trends as part of DEIS's evaluation.	There is evidence that the DEIS scheme is effective, but no attempt was made to evaluate it along resource allocation.
Weir et al. (2018) Ireland	<p>Research type: Quantitative study undertaken as part of the formal evaluation of the DEIS.</p> <p>Study design: Survey instrument aimed at HSCL coordinators. The</p>	On average, the participants reported spending one fifth of their time on home visits. When compared to other activities, conducting home visits was the activity that they engaged the most. Even so, in terms of	The coordinators were positive about the impact that the DEIS scheme had made mentioning support from principals, teachers and parents had contributed as being the most	

<p>Report by Educational Research Centre</p>	<p>instrument had an overall of 19 questions which comprised 140 individual items. The topics covered in the questions were the proportion of time spent on a range of activities, coordinator's perceptions of the impact of the HSCL scheme in their school, the nature and extent of parental involvement in school life, factors contributing to or hindering the success of the scheme, collaboration with other agencies etc. The survey contained a mix of closed-choice and open-ended items.</p> <p>Phenomenon of interest: Explores the views of HSCL coordinators in the second decade of implementation of the DEIS scheme. Comparisons between the current study and a similar study conducted in 2002 were made.</p> <p>Sample of participants: 319 HSCL coordinators (184 in primary setting and 134 in post primary setting).</p>	<p>time spent conducting the home visits, the results showed a decrease in contrast to the reported times spent in 1992-1993 and 2001-2002. Coordinators reported that they spent less time on contact with parents, teachers, and principals than the sample in 1993 and 2001. Results indicated that time spend by nearly half of the coordinators on meetings or other contacts with agencies, liaison with the therapists and administration has increased over time. Time spent on activities was comparable between primary and secondary schools and in different DEIS band and sector.</p> <p>Most coordinators stated that parental involvement in their schools has augmented due to the HSCL and that parents were more involved in a wide range of activities.</p> <p>Over 90% of coordinators indicated that emotional/behavioural difficulties, pupil absenteeism, diet issues (e.g., poor diet), bullying, poor oral language, substance abuse in families, unemployment, poor quality housing, literacy/numeracy difficulties of parents, and general family dysfunction were challenging that learner and their families dealt with. Subsequently, two-thirds of respondents working in primary schools stated that homelessness was a problem facing learners in their schools, with one-quarter indicating that this was true to a great extent. Coordinators indicated that at primary level, most of the issues were more prevalent in Band 1 schools than in Band 2 schools.</p>	<p>significant contributing factors. Conversely, the factors that were identified by the coordinators as hindering the success of the scheme were their workload and in-career development opportunities.</p> <p>When comparing the data collected in 2001 with the data gathered in 2017, it was noted that in 2017 a greater percentage of coordinators considered the available funding, support from other teachers, community involvement in the scheme, and a 'whole school' approach as factors that contributed to the success of the DEIS scheme to a great extent than had been the case in 2001. The most significant difference over time was found for ratings of the extent to which coordinators considered in-career development as contributing to the success of the scheme. Specifically, solely 18% of participants considered the factor as contributing to 'a great extent' to DEIS scheme's success in contrast to 77% of participants in 2001.</p> <p>Overall, the ratings yielded via the survey instrument were largely positive; they suggest that scheme manages to accomplish its aims and objectives. The authors recommend an ongoing monitoring of the impact of the HSCL scheme on families that have learners who attend DEIS schools.</p>	
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		Overall, coordinators stated that HSCL scheme had a positive impact on both parental participation and school and their local communities nonetheless, half of them were unsatisfied with the in-career development available to them. Even so, three-quarters of participants were satisfied with the level of funding provided by the HSCL scheme.		
Gorard et al. (2021) England Peer review article	<p>Research type: Secondary data analysis using the NPD.</p> <p>Study design: Using the records for all pupils in maintained schools in England who reached the age of 16 in 2015/2016 taken from the National Pupil data base, analysis was run on learners e-FSM and learners not eligible for e-FSM. The analysis included the length of e-FSM and the difference between learners eligible for e-FSM and non e-FSM learners.</p> <p>Phenomenon of interest: Evaluation of PP in reducing the poverty attainment gap.</p> <p>Sample of participants: National Pupil Data base for all pupils in maintained schools in England who were 16 years old in the year 2015/2016.</p>	<p>The attainment gap for learners eligible to FSM compared to learners who have never been eligible to FSM is significantly greater for every year that learners continue to be eligible for FSM by the end of Key Stage 4. The attainment gap for learners only eligible for a year or two in contrast to learners non-eligible is small (-0.5) but it increases (-1) for learners who have been eligible for FSM throughout their schooling when compared to those who have never been eligible for FSM.</p> <p>The variation in the attainment gap between long-term FSM-eligible learners and short-term FSM-eligible learners is more significant than the difference between short term FSM-eligible learners and non-eligible to FSM learners. Based on these results, the attainment gap should be lower in areas, schools, or years with short term FSM-eligible learners as they will have a greater average attainment compared to other learners eligible for FSM.</p>	Comparing eligible with non-eligible to FSM learners using raw scores to evaluate the attainment gap can be misleading. Any evidence of impact on the attainment gap is not being measured in a way that will reflect the impact of PP. Further investigation is required before any changes are made.	Not mentioned.

<p>Nelis et al. (2021)</p> <p>Ireland</p> <p>Report by Educational Research Centre</p>	<p>Research type: Quantitative</p> <p>Study design: Using PISA data 2018</p> <p>Phenomenon of interest: Home, school, and wellbeing findings from PISA 2018 for students in DEIS and non-DEIS schools</p> <p>Sample of participants: 157 Irish post-primary schools (41 DEIS schools; 116 non-DEIS schools). Of all participating students in Ireland, 24% attended a DEIS school. The overall number of students that participated in this study was 5,577.</p>	<p>School leaders indicated that in DEIS schools there are issues with recruiting and retaining teachers. Having poor quality teaching staff impacts any progress. DEIS schools are more likely to report SEN status of learners. Issues of absenteeism was an issue in some DEIS schools as well as issues with drugs and alcohol. More monitoring centrally of learner absenteeism is required.</p>	<p>One in eight learners in DEIS school did not have a quiet place to study. Lower rates of parental education and lower expectations from parents could be a barrier to higher education for DEIS learners. Learners reported frequent disruptions particularly in English classes and there is a need for teacher to have better classroom management strategies.</p>	<p>Not Mentioned</p>
<p>Estyn (2020)</p> <p>Wales</p> <p>Report by Estyn</p>	<p>Research type: Mixed methods</p> <p>Study design: Multi case study design.</p> <p>Phenomenon of interest: Effective practice for disadvantaged learners</p> <p>Sample of participants: Case studies identified by Estyn and Local Consortia</p>	<p>Effective targeting means schools integrate PDG in the SDP and they plan, monitor, and evaluate the interventions. A balance the activities between whole school and targeted interventions. LAC learners and PDG: Strategies that are co-designed with children and young people and incorporate the border contextual issues. Using strategic tools with robust monitoring systems with a clear evaluation guidance for schools and LAs. Systems that are focused on outcomes and holistic needs. Training for foster carers, school staff around the emotional needs of LAC learners. Training for designated staff supporting LAC learners. They understand that one approach might not work in a certain context. The schools have a strong focus and high expectations of</p>	<p>Schools that target the grant effectively use the grant strategically that all students make good progress. The schools that are effective secure high rates of attendance. Overall, the impact is too variable. Schools that make effective use of the PDG have remained at around two-thirds of primary and secondary schools. In these schools, disadvantaged pupils benefit positively from the grant spending (this means that a third of schools don't). The strongest evidence base of evaluations with rigorous designs suggests that individual and small group tutoring interventions can be effective in improving the academic skills of LAC.</p>	<p>Not mentioned.</p>

		learners and staff and do not use poverty as a reason for poor attainment.		
Sibieta and Jerrim (2021) UK Report by Education Policy Institute	<p>Research type: Policy review</p> <p>Study design: N/A</p> <p>Phenomenon of interest: Comparison of schools and education policy between the four nations in the UK (e.g., curriculum, exams and assessments, funding, and school structure). The goal of the report is to provide an overview of the key differences in school systems across the UK.</p> <p>Sample of participants: N/A</p>	<p>Deprivation funding: Wales, England, and Scotland have highly visible funding for deprivation PDG, PP and PEF. Deprivation funding is also included in the core budgets to schools. In England for example following their new national funding formula 9% of a school's core budget is allocated on the bases of deprivation. In England this is around 3bn and equates to double of the funding provided through the PP.</p> <p>Coverage: Scotland £1200 per pupil covering around 14% of the pupil population from ages 4-14. Wales £1150 per pupil covering around 20% of the pupil population between ages 5-15 who are e-FSM in the last two years. England £1345 for primary age pupils covering around 22 % and £955 for secondary age pupils covering around 27% of the pupil population who are e-FSM in the past 6 years.</p> <p>NI has undergone various changes particularly after the review in 2013, to simplify the funding formula and target more resources to disadvantage learners. Around 7% of the school budget is allocated for social deprivation in nursery and primary and 5% in post primary education.</p> <p>Early years coverage is in England, Wales, and Scotland, as well as funding for learners in care. Wales also have a grant within PDG to access education e.g., to support with the cost of uniforms.</p> <p>There are complexities in calculating the</p>	<p>The role of the local government is different across the nations. Concerning the running of schools, in England, a long-term reduction in the role of the LAs and a significant increase in the role of individual schools was noted. In Wales, a small change in the role of the LAs was noted whereas in Scotland and NI, the LAs and the national government continue to play a large role in the running of schools.</p>	Not mentioned.

		<p>wider deprivation funding in the Welsh and Scottish system due to the delegated budget through the LAs.</p> <p>England allocates more funding for social deprivation than in Wales, NI and Scotland.</p> <p>Use of resources:</p> <p>Headteachers in Wales are more likely to report that there is a lack of educational material that limit effective provision.</p> <p>Teaching staff were an issue in England and Scotland. In school with a high SEN status headteacher report that there are issues with staffing in England, Scotland, and Wales, and in England and Wales the lack or poor teaching staff was a concern for the headteachers.</p>		
<p>Julius & Ghosh (2022)</p> <p>England</p> <p>Report</p>	<p>Research type: Secondary data analysis</p> <p>Study design:</p> <p>Phenomenon of interest: Investigating the changes in poverty level due to changes in benefit uptake</p> <p>Sample of participants: Learners e-FSM in primary and secondary education in England.</p>	<p>Spending is falling in real terms. There is a need for a range measures on attainment including looking at the differences between disadvantage learners for example the level of persistent disadvantage. It is important to consider data collection methods to support school for example, using Department of Work and Pensions (DWP) to share information with DfE to take the burden from schools. Improve transparency the government to collate information of how the grant is used and produce an annual statement. This would include all the different types of deprivation funding e.g. within the National Funding Formula. Want to open the range of eligibility to learners who have ever previously been entitled.</p>	<p>Protection of pp funding was not consistent over time. Since 2014/2015 the value of pp has decreased since 2014/2015. Despite the government increasing the value of pp funding of 2.7 per cent in 2022/2023, this will decrease in value in real terms. Due to inflation pp received a shortfall in value in real terms. If pp was in line with inflation pupils would have received £160 and £127 more in 2021.</p>	<p>Spending in real terms has fallen.</p>
<p>Barret (2018)</p>	<p>Research type: Qualitative</p>	<p>The first factor that influenced the PP spending decision explored in the research</p>	<p>Evidencing the impact of PP is heavily focused on the publicly available pupil</p>	

<p>England</p> <p>Research article</p>	<p>Study design: Interviews – data was analysed using a thematic analysis approach.</p> <p>Phenomenon of interest: Interviews were undertaken with school staff (ranging from headteachers to teaching assistants) responsible for PP to investigate the implementation of PP and discuss about the principle that should guide the design as well as the implementation and enforcement of socio-economic duties in the future.</p> <p>Sample of participants: Nine primary schools</p>	<p>was the understandings of socio-economic inequality that can be influenced by the setting.</p> <p>More restrictive views of socio-economic inequality could limit the range of support schools provides (e.g., if schools believe exposure to cultural experiences is the responsibility of the parents, they may be less likely to provide them). The results demonstrated that the schools with lower numbers of PP learners provided a wider range of cultural experiences than schools with lower numbers of PP learners.</p> <p>The second factor, conflicts between beliefs about morality and legality, demonstrated that schools felt a conflict between only providing additional support to PP learners (legally 'right'), and providing support to all learners that were considered deprived (morally 'right'). Certain schools used the funding to support all children (e.g., free breakfast club, PP-funded behaviour support staff and school trips available to all learners), whereas other schools restricted the use of the funding to PP learners only.</p> <p>The findings for the third factor, influences of other policies, showed that the Universal Infant FSM implemented in 2014/2015 reduced the number of parents registering their child for FSM in the first few years of school. This has prevented the schools and subsequently the learners from benefiting from PP funding. Schools raised awareness of PP amongst parents and encouraged them to register if eligible.</p>	<p>assessment data (records of performance in English and mathematics and comparison of the scores to the national average and other schools) and Ofsted inspections. The emphasis on academic outcomes could limit the use and therefore potential wider impact of PP for disadvantaged learners. The use of the funding is constrained due to strong focus on academic results to monitor and report on impact and hold schools accountable for the PP funding.</p>	
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		Cultural experiences and growth in confidence were seen as important outcomes. Schools had made efforts to measure the impact of these 'soft outcomes' (e.g., reviews of school trips) and measures of different skills before and after interventions. Accountability work and reporting of performance and impact can take up significant amounts of time. There is a pressure on schools to focus spending on supporting English and maths attainment, and conflicts with support for valuable, 'soft skills'.		
Donnelly (2021) Northern Ireland Report by Northern Ireland Audit Office (NIAO)	<p>Research type: Mixed methods</p> <p>Study design: Interviews with relevant stakeholders, Survey of schools who receive TSN and review of relevant policies</p> <p>Phenomenon of interest: Use, effectiveness, and value for money of social deprivation TSN.</p> <p>Sample of participants: 102 school leaders and stakeholders in NI education system</p>	<p>A significant amount of TSN / Common Funding Scheme (CFS) funding has been provided to schools since 2005 based on Free School Meal Entitlement (FSME) and the Northern Ireland Multiple Deprivation Measures (NIMDM) as measures of social deprivation, however there is a lack of information on how this funding has been spent at a school level. A survey of school leaders indicated that additional teaching assistants, curriculum materials and equipment for additional educational needs were the most common areas of TSN spend. TSN planner was designed to capture a range of info about the use and impact of TSN funding at school level. Uptake of this planner by schools has been poor - only 6% of schools returned data for the academic year 2018-19. Fewer than 20% of respondents to a NIAO survey of school leaders (9% response rate) considered curriculum materials and equipment for additional educational needs to be one of the three most effective TSN interventions, yet over 68% of respondents</p>	<p>Generally educational attainment has improved in recent years, however the attainment gap between non-FSME and FSME pupil still increases as they progress through education. The attainment gap has not changed significantly - only a marginal narrowing in the last 15 years as measured by the target of attaining five or more GCSEs including English and Maths. 85% of respondents considered that learner attainment had improved as a result of TSN funding. Learner confidence was the most common main area of improvement reported by respondents (over 85% of respondents). Learners' behaviour was the third main area of improvement as a result of TSN funding (between 70-75% of respondents).</p>	Non mentioned

		indicated that this was a key area of TSN spend.		
Gilleece et al. (2020) Republic of Ireland Report by Educational Research Centre (ERC)	<p>Research type: Quantitative</p> <p>Study design: Reading, Literacy, Science and Numeracy tests. Student/ Teacher/ Parental questionnaires</p> <p>Phenomenon of interest: To evaluate the performance and achievement in schools serving large numbers of students from disadvantaged backgrounds</p> <p>Sample of participants: 5,577 students from 157 schools (41 DEIS schools, 116 non-DEIS schools)</p>	For disadvantaged groups, wider economic factors have an effect with regards to changes in attainment. State examinations or PISA are not the right measure to show the effectiveness of DEIS schools. For effective monitoring of DEIS schools there needs to be standardised testing in literacy and numeracy.	DEIS schools have higher percentage of SEN which can have an impact on learning. DEIS schools face wider community issues, unemployment and limited parental engagement were a concern for school leaders. 1/5 of DEIS school have low levels of reading (below level 2) PISA results suggest that reading in ROI is significantly higher but that mathematics and science have scope for improvement.	
Gorard (2022) England Peer reviewed article	<p>Research type: Quantitative</p> <p>Study design: Secondary data analysis on NPD.</p> <p>Phenomenon of interest: The impact of PP on attainment by age 16.</p> <p>Sample of participants: Sample of long-term disadvantage learners.</p>	Using data from NPD, on KS 1 & KS2, GDP to measure the fluctuation in the economy as well as region (to look for clustering). English and maths scores from 2005/6 to 2018/9 for learners who have remained e-FSM over time. Measures of PP are not effective, and e-FSM is an unstable category. Changes to assessment, economy and region fluctuation need to be considered more closely when assessing the effectiveness of PP.	That there is a reduction in socio-economic segregation at primary school level. Less clustering and for the long-term disadvantaged better KS1 & KS2 scores. Targeting might be focused on KS1 and the longer-term disadvantaged.	Non-Mentioned.
Verelst et al. (2019). Republic of Ireland (with focus	<p>Research type: Case studies</p> <p>Study design: Policy reviews from Finland, Ireland, and Slovakia.</p> <p>Phenomenon of interest:</p>	ROI has periodic reviews of the policy. Structural weaknesses are present in the ROI equity scheme pushing schools to get better then taking the funding. There is also the argument that schools in band 1 have the hardest cohort and some local level decision	ROI increased performance in literacy less in math but attendance and retention has increased. For Pupil outcomes for primary students are positive with a reduction on the attainment gap 10.8 % and 8% in	

on other countries) Report	Equity funding in different countries. Sample of participants: Finland, Ireland, and Slovakia education policy.	making might support the schools and learners more effectively. ROI - there need to be careful targeting the effect of location is not considered (Urban -Rural), and the funding is not very flexible and limits autonomy. There is a risk in ROI that segregation will happen. DEIS does not cover all disadvantaged learners.	secondary. But this is slowing down. There is some evidence that schools who serve disadvantaged learners have the less qualified teachers hence, there is a need to have high quality teaching. Minimising academic segregation can have a stronger impact on equity than equity finding (ghetto schools).	
Smyth et al. (2022) Northern Ireland and Republic of Ireland Report	Research type: Mixed methods Study design: Standardised tests/ measures and stakeholder interviews. Phenomenon of interest: Comparison of NI and ROI. Sample of participants: 31 in-depth interviews with stakeholders in both NI and ROI.	DEIS is thought to contribute to a higher retention of students. In Ireland academic selection is thought to explain the higher 'early school leaving'. Equity funding for ROI is seen as a positive, in Ireland there is a lack of connection between the activities a/supports and the resourcing. Both countries felt that the education systems were underfunded. Disadvantage is wider than the school, and there needs to be metrics that include these contextual issues. The funding system in NI, TSN, does not have robust monitoring systems. Research indicates that over half of those from socio-economically disadvantaged backgrounds attend non-DEIS schools so receive no supports for their disadvantage. This analysis they use exam waiver as a measure of disadvantage.	Disadvantaged learners in Ireland are more likely to leave school early, but learners in ROI are less likely to drop out but have poor exam results. In Ireland there is a lack of expectation particularly for young working-class males to enter tertiary education. Schools in the most disadvantaged areas in NI have high dropout rates. In NI the school segregation system (grammar/ comprehensive) leads to inequalities. Given the high stakes testing for grammar schools better off learners can purchase private tuition, perpetuating the advantage over disadvantaged learners.	There is some suggestion that ROI have higher wages, and this could be used in an economic evaluation.
Northern Ireland Human Rights Commission (2019) Northern Ireland Response to consultation	Research type: Consultation on supporting newcomer learners. Study design: N/A Phenomenon of interest: Newcomer learners	Within the CFF there is a payment for newcomer pupils, but this is not sufficient to cover and support the diverse needs of this group of learners. They recommend that the funding is ringfenced for newcomers and that there are monitoring activities on the spent resources.	N/A	

	Sample of participants: N/A			
Gorard et al. (2021) England Research article	<p>Research type: Quantitative</p> <p>Study design: Secondary data analysis. Using the NPD from 2005/6 to 2018/19 pupils in maintained schools including special schools and PRUs.</p> <p>Phenomenon of interest: Long-term disadvantaged pupils eligible for FSM.</p> <p>Sample of participants: NPD from 2005/6 to 2018/19 pupils in maintained schools including special schools and PRUs</p>	<p>Using the NPD from 2005/6 to 2018/19 pupils in maintained schools including special schools and PRUs. They used KS4 capped and KS4 total points scores. New indicators were added to the model, KS2 points as a predictor of KS4 outcomes and pupils who attended a school with long term disadvantage pupils.</p> <p>This paper shows that the usual way of measuring the attainment gap is not getting to the detail in the policy. This paper suggests new ways to measuring the attainment gap and that policy changes should not be based on existing analysis. Clustering of long-term disadvantage is in decline and suggests PP could be the cause of this. One explanation is that the long-term pupils are more attractive in the funding that comes with then reducing unconscious bias. There is a lack of evidence on how to use PP at KS4. Changes to the assessment obscure the picture of the effectiveness of PP. Wider policy needs to address poverty through assisting more deprived areas to limit segregation. The work for schools is to implement interventions that are effective, and evidence based and for changes to assessment do not affect the attainment gap.</p>	Less clustering of long-term disadvantaged learners.	
Hepworth et al. (2021) Republic of Ireland	<p>Research type: Mixed methods</p> <p>Study design: PISA outcome data, policy reviews, surveys, and interviews with key stakeholders.</p>	DEIS schools where there are clear planning, targets and monitoring activities supported learners. Where schools use attainment data to plan and target strategies were effective. A strong focus on cross curricula literacy and numeracy in the Junior Cycle is seen to be	The ROI have the best reading outcomes of all the other nations on the PISA test. DEIS had evaluation build into the design and evaluated periodically. Strong focus on Literacy and Mathematics is seen as driving	There is evidence that the DEIS scheme is effective, but no attempt was made to evaluated

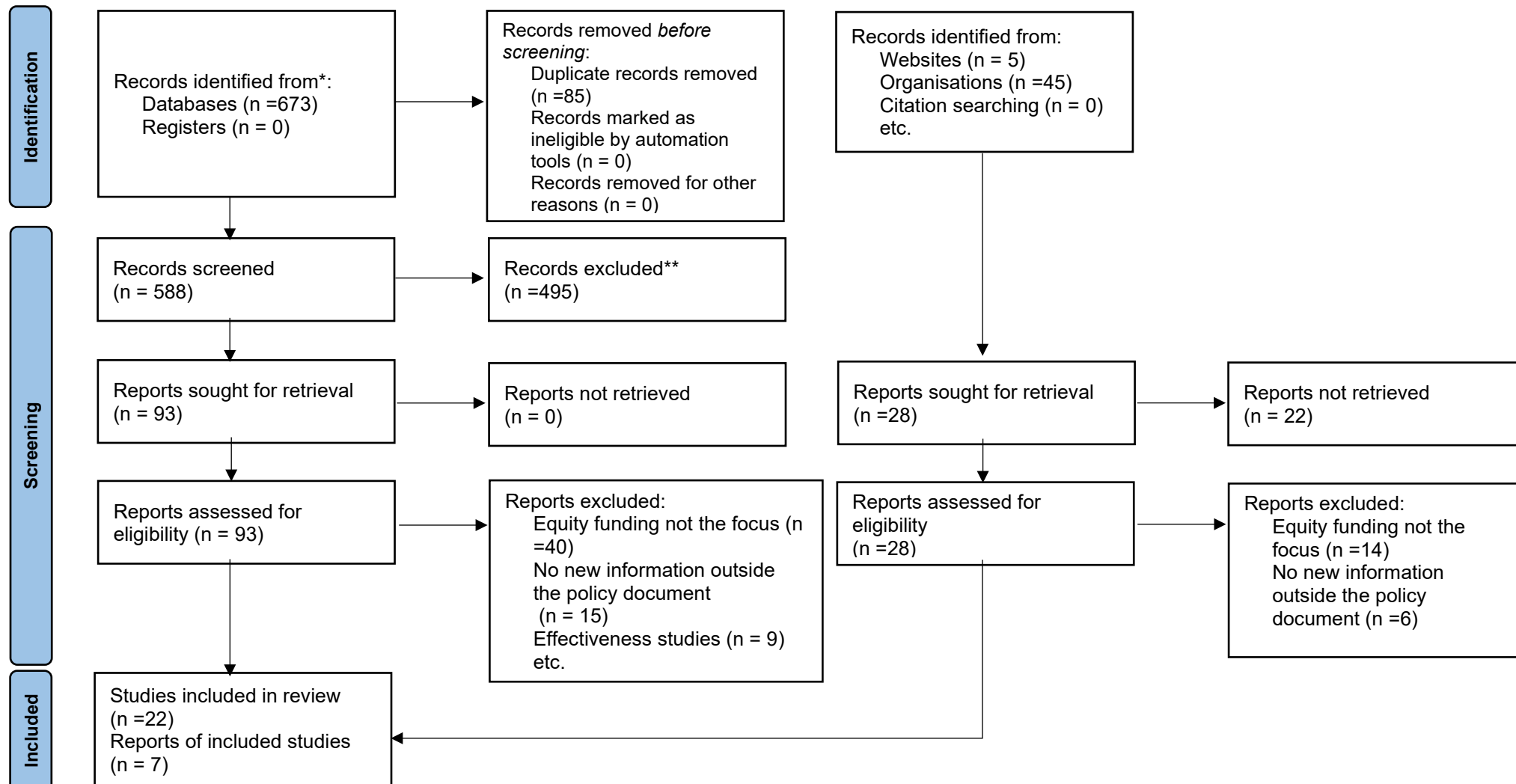
<p>Report by National Foundation for Education Research (NFER)</p>	<p>Phenomenon of interest: Using PISA to inform policy, demonstrated by using ROI as an example.</p> <p>Sample of participants: Policy experts from all UK nations.</p>	<p>supporting the improvement of national assessments. After a review and the opening of the attainment gap the DEIS 2017 plan was introduced to further improve the outcomes for learners at risk of educational disadvantage. The New DEIS Plan 2017. The DEIS policy is stable regardless of different political administrations and this was seen to be effective in keeping the policy a success. To consider elements of the policy that was a success was the DEIS policy and the National Literacy and Numeracy Strategy. Evaluation, outcome measures and timescales are built into the policy and monitored, evaluated inform future changes of the policy.</p>	<p>continued impact on outcomes. Attainment, attendance, and parental engagement have seen continued improvement. There are still disparities between Band 1 and Band 2 schools, learners from Band 1 schools do have lower reading outcomes particularly in urban DEIS schools.</p>	<p>along resource allocation.</p>
<p>Salisbury (2013) Northern Ireland Report</p>	<p>Research type: Mixed methods</p> <p>Study design: Review of evidence and consultation with stakeholders.</p> <p>Phenomenon of interest: An independent review of the CFS.</p> <p>Sample of participants: Interviews with relevant stakeholders.</p>	<p>The funding system is complex and is not always targeted correctly. The education attainment factor is not applied evenly in the system, with some schools missing out e.g., certain types of nursery settings. At the time there were no calculations for LAC in the CFF. TSN is split into two elements 1 social deprivation and educational attainment (SEN). There is a lack of monitoring and accountability with regards to TSN spending. Recommend that spending should be linked to evidence. Schools with a high concentration on pupils have biggest attainment gaps. Traveller and Roma, looked after pupils and pupils with SEN are at the greatest risk of low attainment. E-FSM was the best measure of social deprivation as the data was collected annually and readily available the report highlights NIMDM and Income Deprivation Affecting Children Index (IDACI) as other possible measures that would link wider social deprivation and not</p>	<p>In 2011 only 32% of e-FSM learners achieved A*-C compared with 65% without e-FSM entitlement. On international scales NI have good outcome for primary levels, reading is above the average in PIRLS and TIMSS. But PISA results demonstrate that at 15 reading and Math is the Organisation for Economic Co-operation and Development (OECD) average with scores reducing over the last two cycles. For SEN status there is evidence that NI learners are able to overcome the effects of social-economic disadvantage better than some countries but there are still large gaps in attainment.</p>	

		just income deprivation. Post –primary, there are issues with the criteria, and this could mean at this level there are pupils missing out, with reference to the changes to universal credit. There is still a need to find the best way to tackle to attainment gap. More money is needed, the possibility or having EVER FSM or adjusted FSM to increase post primary funding. It is recommended to simplify the CFF and to distribute funding according to pupil's not institutional need.		
Fleming & Harford (2021) Republic of Ireland Research article	<p>Research type: Qualitative</p> <p>Study design: Case study research consisting of six randomly selected DEIS post-primary schools, interviews, and focus group discussions.</p> <p>Phenomenon of interest: Evaluation of the resources provided under the DEIS funding considering the challenges the schools communities faced.</p> <p>Sample of participants: 43 teachers and principals, 29 senior students, 41 parents/guardians and 28 stakeholders</p>	The context of the DEIS schools that participated in this study differed in terms of size, tradition, school culture, stage of development, enrolment patterns, etc. In contrast to non-DEIS schools, the DEIS schools faced challenges in meeting the needs of their students and local communities who faced various forms of poverty. The findings show that the key challenges faced by the participants were resourcing of teaching and learning, resourcing of leadership and management and resourcing of well-being.	The introduction of the DEIS scheme has contributed positively to the educational disadvantage however, the progress is small. Educational disadvantage continues to be seen as a school-based issue. Nonetheless, to improve its effectiveness, the deep-seated relationship between educational disadvantage and the wider economic inequality in the Irish society needs to be recognised at policy level.	There is evidence that the DEIS scheme is effective, but no attempt was made to evaluated along resource allocation.
Mannay & Lyttleton-Smith (2019) Wales Report	<p>Research type: Mixed methods.</p> <p>Study design: Interviews with relevant stakeholders.</p>	Evidence suggests LAs did not monitor or report the resource spending monitoring /evaluation systems were deemed inadequate requiring improvement. There is a wider lack of lack of accountability for delegated funds. New funding arrangements was beneficial for LAC educational support	The regional consortia helped improve attendance, exclusion rates, GCSE's, wellbeing was improved.	

	<p>Phenomenon of interest: Evaluation of the Implementation of the PDG for LAC.</p> <p>Sample of participants: Interviews with relevant stakeholders.</p>	<p>and it improved the skills of staff. Also, it boosted efficiency across schools, enhanced links between schools, stakeholders LAs social services and foster careers.</p>		
<p>Read et al. (2020)</p> <p>England</p> <p>Research project</p>	<p>Research type: Mixed methods</p> <p>Study design: Interviews, paired dialog, and survey with relevant staff.</p> <p>Phenomenon of interest: Effective use of PP+ to improve educational outcomes for LAC.</p> <p>Sample of participants: 187 survey respondents. 5 interviews 3 sessions of paired dialog.</p>	<p>Effectiveness of intervention funded by PP+ is limited. Participants did look at some evidence on intervention for LAC, but also used their own knowledge. There was a lack of training for the PP+ role. The interventions were primarily on a case-by-case basis.</p> <p>Spending on: Specialist support services like speech and language therapy. Training for stakeholders particularly around emotional needs of the learners. Additional staff, classroom assistants to support LAC learners. Virtual school staff and resources Bespoke interventions. Equipment Regional events</p> <p>The survey indicated that participants were aware of what they should do but were limited in what they do. Given the way the funding is allocated at the end of the year unspent PP+ might get spend not on the most appropriate activities as they must spend it in a rush. Need for better between professional stakeholders to share good practice. SMART (specific, measurable, achievable, relevant and time base) was an effective framework in the educational plans for each child and they support the outcomes for LAC. There is a need to incorporate softer</p>	<p>Measurement difficulties: there is difficulty in tracking the softer outcomes and some interventions take time to see the benefits.</p>	

		outcomes and exclusion rates into the impact of PP+, there need to be a benchmarking for this cohort of educational related data.		
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Appedix E – PRISMA Flow Chart



From: Page, M.J., McKenzie, J.E., Bossuyt, P.M., Boutron, I., Hoffmann, T.C., Mulrow, C.D., Shamseer, L., Tetzlaff, J.M., Akl, E.A., Brennan, S.E. and Chou, R. (2021). The PRISMA 2020 statement: an updated guideline for reporting systematic reviews. *BMJ* 2021, 372(71), pp.1-9. DOI: <https://doi.org/10.1136/bmj.n71>. For more information, visit: <http://www.prisma-statement.org/>