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9 May 2025

**Members of the
Education, Children and Families Committee**

Chief Executive's Office

Rachel Blair
Chief Officer (Legal & Democratic)
Civic Centre, Windmillhill Street,
Motherwell ML1 1AB
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Notice is given that a Meeting of the **Education, Children and Families Committee** is to be held in the Council Chamber, Civic Centre, Windmillhill Street, Motherwell, ML1 1AB on Tuesday, 20 May 2025 at 14:00 PM which you are requested to attend.

The agenda of business is attached.

Rachel Blair
Chief Officer (Legal & Democratic)

Members :

M McBride, B Baudo, A Ballinger, C Barclay, A Beveridge, M Boyd, H Brannan-McVey, B Burgess, T Carragher, C Costello, M Coyle, S Coyle, G Currie, P Di Mascio, H Dunbar, F Fotheringham, H Gray, M Hughes, T Johnston, J Jones, P Kelly, A Khan, K Larson, G Lennon, H Loughran, A Masterton, B McCluskey, P McDade, F McKay, R McKendrick, C McManus, M McPake, J McPhilemy, P Patton, J Reddin, G Robinson, A Smith, A Stubbs, J Toner, N Wilson, M Clarkson, G McCormick, M McCrossan, I Scott.

Agenda

- 1 **Declarations of Interest In Terms of the Ethical Standards In Public Life Etc. (Scotland) Act 2000**

Operational

- 2 **Outcome of National Thematic Inspection: NLC** 5 - 20
Submit report by the Chief Officer (Education - North) providing the draft outcome report from the National Thematic Inspection by Education Scotland.
- 3 **Review of Education and Families Service Operating Structures** 21 - 50
Submit report by Chief Officer (Education) seeking approval of the revised operating model for Education and Families
- 4 **Proposed relocation of Glenboig Primary School to a new site** 51 - 98
Submit report by the Chief Officer (Education - North) (1) providing an update on the outcome of the statutory consultation process on the relocation of Glenboig Primary School, and (2) seeking approval for the relocation of Glenboig Primary School.
- 5 **School Term Review** 99 - 112
Submit report by Chief Officer (Education - North) detailing the outcome of the consultation on school holiday arrangements.
- 6 **Review of the North Lanarkshire Scheme of Devolved School Management** 113 - 212
Submit report by the Chief Officer (Education - North) seeking approval of the updated scheme of Devolved School Management for the period from August 2025 to July 2028.
- 7 **Proposed Strategic Equity Fund Operating Model** 213 - 236
Submit report by the Chief Officer (Education - South) (1) providing an update on the impact of the use of the allocated Scottish Equity Fund for session 2024-25 and (2) outlining proposals for a new operating model for session 2025-26.

- 8 **Resilient People: Improving Health and Wellbeing, Family Support and School Attendance** 237 - 256
- Submit report by the Chief Social Work Officer (Education, Justice and Integrated Practice) setting out details of the continued progress in delivering whole family support locally, addressing the impacts of poverty and reducing inequality.

Financial

- 9 **Revenue Budget Monitoring Report** 257 - 268
- Submit report by the Chief Officer (Education - North) providing a summary of the financial performance of the Education and Families Service for the period from 1 April 2024 to 28 February 2025 (Period 12) and highlighting the projected outturn position as at 31 March 2025.

North Lanarkshire Council Report

Education, Children and Families Committee

Does this report require to be approved? ☐ Yes ☒ No

Ref BS/MOH

Date 20/05/25

Outcome of National Thematic Inspection: NLC

From Barry Smedley, Chief Officer (Education North)

E-mail Smedleybar@northlan.gov.uk **Telephone** 07919245004

Executive Summary

Education Scotland is the national body that supports local authorities and the Scottish education system to gather, analyse, evaluate and share an agreed set of data, including independent external evaluation (scrutiny/inspection).

In addition to establishment inspections, Education Scotland carry out national thematic inspections; the purpose of these is to investigate specific topics or themes. During a thematic inspection, evidence is gathered and reported on, and this helps national and local government to make decisions and develop policies.

Recommendations

It is recommended that Committee:

- (1) Endorse the contents of this report.

The Plan for North Lanarkshire

Priority	Support all children and young people to realise their full potential
Ambition statement	(7) Enhance collaborative working to maximise support and ensure all our children and young people are included, supported, and safe
Programme of Work	Brighter Futures

1. Background

- 1.1 Each year, Education Scotland undertakes a programme of scrutiny (inspection) in each local authority to gather evidence of what is working well in our education system, areas which are showing improvement, and areas where further development is needed.
 - 1.2 In addition to establishment level inspections, Education Scotland also carry out thematic inspections.
 - 1.3 On the 28th of June 2024, the Cabinet Secretary wrote to all 32 local authorities in Scotland, advising them that Education Scotland would be carrying out a national thematic inspection around local authority approaches to support school improvement.
 - 1.4 The purpose of the national thematic inspection was to provide a valuable opportunity to identify what was working well and what challenges exist in local authorities across Scotland.
 - 1.5 All 32 local authorities were visited between September and October 2024, with North Lanarkshire's visit being the 22nd and the 23rd of October.
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2. Report

- 2.1 A team of two inspectors visited North Lanarkshire over two days in October 2024 to gather information and views from local authority staff involved in school improvement.
- 2.2 The following questions were the focus for the inspection:
 - How do local authorities support schools to improve the quality of education through implementing effective improvement planning and standards and quality reporting?
 - How do local authorities support schools to improve the quality of education through self-evaluation and quality assurance?
 - How do local authorities support schools to improve the quality of education through professional learning?
 - How do local authorities deliver universal support and challenge for all schools, and/or targeted support for specific schools to improve the quality of education?
- 2.3 As part of the inspection process, the inspection team met with focus groups of central staff, headteachers, teachers, partners, parents and elected members to gather their views.
- 2.4 In preparation for the visit, a team of central officers gathered evidence around the four key questions and submitted a self-evaluation summary paper to the inspection team, prior to the inspection process beginning. They also presented a high-level summary of progress against each of the four key questions, on the first day of the visit.
- 2.5 During the visit, the inspection team used the focus groups as an opportunity to triangulate the evidence and statements that the local authority presented as their key strengths and next steps. They also looked at a small number of key documents, presented by the team, which exemplify progress made.

Key Strengths Identified

- 2.6 The following areas were identified as key strengths during the thematic inspection:

- NLC's overarching vision is well understood by staff across the service and there is clear alignment of Corporate, Service and Establishment planning. Strategic plans include clear Key Performance Indicators (KPIs).
- Chief Officers work closely with elected members, who highlight the importance of the positive, constructive relationships that exist between themselves and the officers.
- The Service's Quality Assurance (QA) framework provides a clear structure for self-evaluation activity and helps school leaders to plan for continuous improvement. The framework highlights shared expectations and makes clear to school leaders their duties and responsibilities.
- The service has clearly aligned processes and procedures in place to support improvement; this includes a package of support materials and the integration of Pupil Equity Funding with improvement planning.
- North Lanarkshire has strong, structural foundations to support empowerment and improvement at local level (i.e., empowering clusters).
- There is a comprehensive continuous lifelong professional learning (CLPL) offer at the universal, additional and intensive levels, which is helping to build overall staff capacity.
- The leadership framework and new headteacher induction programme is empowering leaders and supporting workforce development.
- The service has developed a strong culture of professional enquiry and use conferences well to strengthen professional learning opportunities for staff.
- Local authority led Validated Self-Evaluations (VSEs) are continuing to develop and respond to the needs of the service.
- The service is effectively developing a collaborative culture that supports continuous improvement at school and cluster level. Approaches to planning for improvement include a clear focus on identification and intervention to address local community needs through effective integrated partnership working.
- The virtual school model has been successful in improving outcomes for care-experienced young people.
- NLC's Learning Hub and pedagogy team support improvements in classrooms by modelling good practice and building staff expertise.
- Partnership with the West Partnership and Robert Owen Centre supports engagement with current research and new pedagogical approaches.
- Staff participation in collaborative programs like 'Improving Our Classrooms' positively impacts learning, teaching, and assessment.
- The 'Empowering Clusters' model supports targeted and contextualised improvement, with evidence of positive impacts on outcomes for children and young people.

Next Steps Identified

2.7 The following areas for improvement/next steps were identified by the inspection team:

- Education and Families Managers should continue to develop a more consistent approach to support and challenge visits to establishments.
- More regular support and challenge in the self-evaluation of their work will increase the pace of improvement at school, and subsequently local authority, level.
- There should be continued use of central evaluation evidence to inform system level changes and improvement priorities.
- Improved attainment should remain an area of focus, particularly at the senior phase.
- As planned, the service should continue to address inconsistencies in Curriculum for Excellence data across the whole broad general education (BGE).
- Opportunities for parental engagement should be maximised.
- The local authority should, as planned, develop a data system that can be used uniformly across all establishments, ensuring consistency.

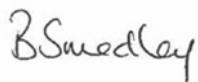
- Structured sharing good practice networks should be established across the local authority.
 - Continue to support establishment leaders to define the impacts of targeted and universal support more clearly.
 - As planned, continue to deploy HMIE Associate Assessors (AAs) to support school improvement.
 - Increase the frequency of scoping the quality of learning, teaching and assessment across schools to improve outcomes for all children and young people, over time.
- 2.8 The inspection team noted challenges faced in providing consistent, high-quality support across all establishments, as a result of the size and scope of central officers' remits.
- 2.9 A copy of North Lanarkshire's Thematic Inspection Report is included in Appendix 1. Education Scotland did not publish individual reports for Local Authorities. Information gathered from all Local Authorities was aggregated and used to create one National Thematic Report.
- 2.10 Officers will use the findings presented in the national report and our Local Authority report to inform service level planning for continuous improvement.
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3. Measures of success

- 3.1 Improved attainment, particularly at the senior phase.
- 3.2 Improved consistency in establishment support and challenge.
- 3.3 Creation of a consistent data system, ensuring consistency in recording and understanding of data
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4. Supporting documentation

- 4.1 Appendix 1: North Lanarkshire's Thematic Inspection Report.



Barry Smedley
Chief Officer (Education North)

5. Impacts

5.1 Public Sector Equality Duty and Fairer Scotland Duty Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact? If Yes, has an assessment been carried out and published on the council's website? https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments Yes <input type="checkbox"/> No <input type="checkbox"/>
5.2 Financial impact Does the report contain any financial impacts? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant financial impacts been discussed and agreed with Finance? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.3 HR policy impact Does the report contain any HR policy or procedure impacts? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant HR impacts been discussed and agreed with People Resources? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.4 Legal impact Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.5 Data protection impact Does the report / project / practice contain or involve the processing of personal data? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, is the processing of this personal data likely to result in a high risk to the data subject? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk Yes <input type="checkbox"/> No <input type="checkbox"/>
5.6 Technology / Digital impact Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact?

	<p>Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
5.7	<p>Environmental / Carbon impact</p> <p>Does the report / project / practice contain information that has an impact on any environmental or carbon matters?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
5.8	<p>Communications impact</p> <p>Does the report contain any information that has an impact on the council's communications activities?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
5.9	<p>Risk impact</p> <p>Is there a risk impact?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed?</p> <p>Risks associated are included within the Service Risk Register, and managed accordingly</p>
5.10	<p>Armed Forces Covenant Duty</p> <p>Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.</p>
5.11	<p>Children's rights and wellbeing impact</p> <p>Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC).</p> <p>If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>

Appendix 1:

National Thematic Inspection: Local authority approaches to supporting school improvement

Summarised Findings

Local Authority	North Lanarkshire Council
Lead HM Inspector	John Paul Cassidy

In October 2024, a team of inspectors from Education Scotland visited North Lanarkshire Council. During our visit, we talked to senior leaders, local authority officers, parents/carers, headteachers, teachers, representatives from professional associations and elected members.

Purpose and themes

The purpose of the visit was to gather evidence about how North Lanarkshire Council supports school improvement, with a focus on how they support schools to improve the quality of education through:

- the implementation of effective improvement planning and standards and quality reporting
- self- evaluation and quality assurance
- professional learning
- universal and targeted support and challenge

Context of the local authority

North Lanarkshire Council area covers a large geographical area. The council borders Glasgow City, as well as a number of small and rural communities across west central Scotland. The council stretches from Cumbernauld, bordering Stirling in the north, to the Clyde Valley in the south.

Thirty-two percent of children and young people in primary and secondary schools live within deciles 1-2 of the Scottish Index of Multiple Deprivation (SIMD).

Approximately 30% of children are registered with an additional support need. The average attendance in 2022/2023 was 88.7%. The national average is 90.2%.

In 2023/2024 in North Lanarkshire Council, children and young people are educated across 118 primary schools, 23 secondary schools, 13 Additional Support Needs schools and 15 supported learning centres within mainstream schools. Three schools provide Gàidhlig (Gaelic) Medium Education.

The Education, Children and Families service has an operating model of: two chief officers for Education and one for Social work, Justice and Integrative practices. In addition, there

are three Senior Education and Families Managers and nine Education and Families Managers.

A Principal Educational Psychologist, wider psychological services team, social work colleagues, and a number of education officers with a range of responsibilities also support schools. There are also a range of seconded posts such as the cluster improvement and integration leads (CIILs).

There have been a number of changes to staffing at senior officer level within the local authority central team for education, in recent years. Further changes in staffing are taking place currently, with senior officer vacant posts being filled over the next few months.

Theme 1 - How do local authorities support schools to improve the quality of education through implementing effective improvement planning and standards and quality reporting?

- *How clear and effective is the local authority's arrangements and advice to schools on self-evaluation, improvement planning and standards and quality reporting?*
- *How does the local authority ensure that schools' self-evaluation is accurate, rigorous and robust, based on reliable and comprehensive data and information?*
- *In what ways does the local authority promote collaboration with all stakeholders, especially learners, as essential to effective self-evaluation and identification of priorities?*
- *What is the role of central teams in providing critical feedback to school leaders on the quality/robustness of their self-evaluation and school improvement planning processes?*
- *To what extent does the local authority use the data from individual school or cluster improvement plans and standards and quality reports, to direct their officers' work?*

North Lanarkshire Council (NLC)'s Education, Children and Families service improvement plan and standards and quality reports contain performance measures which reflect clearly the shared vision. These plans reflect all aspects of the local authority's focus on 'resilient people and brighter futures'. The key drivers in education are derived from this service plan. These drivers include improving leadership; improving standards across schools and centres; improving wellbeing and ensuring children and young people thrive and; supporting families through effective partnership working. These drivers inform approaches to school improvement and self-evaluation processes and standards and quality reporting as part of the quality assurance (QA) framework. The QA framework provides a clear structure for self-evaluation activity. This helps create a shared understanding of key aspects of self-evaluation activity across establishments. Local authority data indicates that most headteachers and other stakeholders understand their roles and responsibilities. This is helping to ensure effective implementation of the QA framework to support continuous improvement. The annual planning and reporting calendar outlines key planning and reporting activity across the school year. This highlights shared expectations and makes clear to school leaders their duties and responsibilities in relation to planning and reporting.

The local authority has standardised informative report templates for schools. These include standards and quality reports, school improvement planning and Pupil Equity Fund (PEF) plans and reports, based on national How Good is Our School? 4th edition (HGIOS?4) quality indicators (QIs). All schools use these reports and submit them within agreed timescales. The information gathered includes attainment data, attendance and exclusion figures and details about strategies to support parental engagement and

parental complaints. This complements the extensive working knowledge central officers have of schools. There are also self-evaluation documents that support schools to identify strengths and areas for improvement in aspects of the curriculum, such as literacy, numeracy and digital literacy. Feedback gathered by the central team from school leaders and central officers indicates that self-evaluation materials are beginning to impact positively on the quality and consistency of school-based planning for self-improvement.

Headteachers welcome the continuation of the high-quality drop-in sessions provided by central officers last session to support improvement planning and reporting of progress. These sessions were geared towards supporting headteachers better with the collation of relevant information, use of appropriate terminology and impact statements through their AIRs and AIPs. As a result, central officers have identified clear improvements in schools' reporting and improvement planning. This is allowing school leaders and central officers to monitor more clearly schools' progress in key priority areas for improvement.

Senior officers in the central team have prioritised building a more positive collaborative culture to capitalise on all capacity for improvement. Since the beginning of session 2024/25, headteachers in secondary schools work in cross local authority trios and quads. The central team has carefully designed these trios and quads to bring schools of similar size and demographics together. This development is at the very early stages. Headteachers and central officers speak highly of the 'Empowering Clusters Model', which is based around the needs of local communities. Headteachers create a shared priority that enables them to address cluster level needs and build on strengths identified through collaborative self-evaluation activity. Education and families managers (EFMs) and cluster improvement and integration leads (CIILs), link with each cluster to support a consistent drive for improvement. Headteachers believe this is a key mechanism in ensuring integrated partnership working centred around the wellbeing of children and young people within their local communities.

Across the local authority, there has been a strong focus on improving data literacy. There is a current focus on consistency of approaches to identifying effective and measurable outcomes. Central officers and headteachers have benefitted from bespoke professional training such as that provided by the Education Scotland Attainment Advisor, Insight training and coaching to develop their understanding of effective outcomes and measures. This is supporting higher quality, more focused discussions between central officers and headteachers. Evidence shows this has enhanced the central team's capacity to support improvement activity. Local authority officers provide schools with useful data in relation to performance measures to support planning for improvement. The local authority quality assurance calendar activities support schools to identify their areas of strength and areas for improvement.

The local authority senior officer team prioritises consulting stakeholders, although the process is at an early stage. This includes learners, who are involved in a range of focus groups, often promoted through community learning and development (CLD) partners. This has included consultation on poverty-proofing and The Promise. In addition, the local authority sends out extensive questionnaires, which inform aspects of planning for improvement and provides a child-friendly service plan. Chief Officers work closely with elected members, who highlight the importance of the positive, constructive relationships that exist between themselves and the officers.

Chief Officers helpfully hold regular meetings with the Chairs of the Parent Councils to

discuss relevant agenda items. These include information about educational priorities and strategies to increase parental engagement. Parents are very keen to contribute to improvement at local authority level in any way they can.

There are strong positive relationships between schools and EFMs. Each school has a link EFM/SEFM. Headteachers appreciate the planned, organised nature of this support. Meetings are seen as supportive in providing both challenge and support to establishments. The consistent nature of the EFM role gives school leaders regular support and challenge which is tracked over time, although the link EFMs may change on occasion. Central officers maintain a strategic overview of the level of capacity to improve, and/or the support required, for each school. There are clear criteria for additional support. The need for this is identified both through Validated Self-Evaluation (VSE) status and through quality assurance activities.

Education and Families Managers quality assure and provide critical feedback on the draft plans of every establishment. They verify that the identified priorities are based on reliable data and correlate with sound evidence, drawing from a range of sources. Each visit has a specific focus. The first discussion is an individual visit to review the improvement report, discuss the rationale behind the new priorities identified and agree the red, amber, green, (RAG) and Validated Self Evaluation (VSE) status. Central officers have concluded, through the review process of submitted plans and reports, that the majority of staff are improving their ability to analyse and use self-evaluation evidence to review and report on progress against set priorities and four Quality Indicators (QIs). Currently, the consistency and quality of feedback that headteachers receive is variable across the local authority and sectors. Senior officers are working with school link officers and other central colleagues who engage with schools to improve aspects of feedback and challenge more consistently. This will help to ensure that all headteachers receive an improved baseline level of expected challenge, support and feedback from central officers.

The central team makes effective use of information from school improvement plans to drive their own work in supporting schools on a school-by-school basis. They challenge school leaders when data indicates that school performance has fallen below expected standards and use stretch aims to challenge headteachers constructively to improve outcomes for children and young people. There is a need to balance the desire within the central team to be responsive to demand with their own capacity to deliver support. Key themes from VSEs are also collated and used to inform service improvement planning for continuous improvement. Local authority senior leaders should continue to maintain focus on raising attainment.

Theme 2: How do local authorities support schools to improve the quality of education through self-evaluation and quality assurance?

- *What methods does the local authority use to evaluate school performance (review the quality of education) for example, gathering evidence from stakeholders, review/validated self-evaluation visits, attainment analysis)? How effective are these methods? How often does this take place?*
- *To what extent do officers carry out regular and rigorous evaluation of the quality of school provision? How is this work quality assured?*
- *How does the local authority evaluate the quality of learning, teaching and assessment?*
- *How clear and effective is the advice and support for schools on approaches to self-evaluation and their quality assurance? How effectively does the local authority moderate this at strategic and school levels?*
- *How does the local authority identify and share effective practice through quality assurance? Is this making a difference across the authority?*

Education and Families Managers engage with their link schools four times per session, as a minimum offer. Almost all headteachers report that they receive a rigorous balance of support and challenging dialogue that helps to inform directly improvement priorities. Link officers over the last couple of years, have been working more collaboratively to improve the consistency of rigour and quality of their dialogue with, and feedback to, link schools. This consistency is beginning to develop and improve. Headteachers report that this is helping them to interpret and embed better national standards and expectations to bring about improvement, principally linked to the four 'core' quality indicators.

All headteachers have undergone formal training for self-evaluation and continuous improvement (SECI). This is beginning to improve the quality of improvement planning targets across schools. This is also beginning to improve the robustness of how headteachers, senior leaders and subject level teachers, monitor the progress of highlighted areas for improvement through their self-evaluation. It is currently too early to identify the full impact of this work. Support in this area is continuing between local authority central staff and school staff at all levels.

The local authority directs VSE visits to targeted schools based on local authority self-evaluation (RAG). However, there is also an option for individual schools to request a VSE on aspects of their practice. These requests are often supported by networks (pedagogy team, virtual team, learning and innovation hub, digital schools). The local authority is currently planning to update and strengthen their VSE model. A new model will have a revised approach for secondary schools as part of the improvement cycle, to ensure all establishments are included in a much more regular cycle that supports continuous improvement.

Currently, central officers carry out rigorous evaluations of schools' performance linked to a school's 'RAG' status. This status is agreed between the link officer and headteacher, depending on a number of variables. For example, if a new headteacher or leadership team has recently been appointed; if there is immediate and urgent improvement required to secure improvements; if additional support is required from the local authority to secure sustainable improvements or if the establishment has been performing consistently well across all measures. Twice per session as a minimum, schools engage in rigorous dialogue with their EFM to scrutinise their

annual improvement plan and evaluate evidence of progress against national Benchmarks.

Local authority officers currently evaluate the quality of learning, teaching and assessment through schools' self-evaluation of this area of their work. They also carry out reviews of learning, teaching and assessment across schools where this is a priority area for improvement. This is also the case where a school is likely to be selected for national HM inspection. This model of school evaluation is currently under review. The aim moving forward is that secondary schools will work in trios from next session. As such, they will be involved in three-yearly peer reviews of the provision of learning, teaching and assessment in each other's schools. This will be supported and co-led by central officers. Future models to assess this area of provision across primary schools is currently under review. Schools would benefit from further support and challenge in the self-evaluation of their work. This work to address the frequency of scoping the quality of learning, teaching and assessment across schools should help to improve outcomes for all children and young people over time. Work to improve the quality of learning, teaching and assessment is currently heavily supported by the Learning Teaching and Assessment Education Support Officer and central pedagogy team. Headteachers report that this team provides invaluable support and challenge to schools in terms of support, professional dialogue and provision of high-quality resources to support teachers to improve this area of schools' work.

The head of the local authority virtual school model and their team also support schools' improvement work well. They help schools improve the engagement of targeted children and young people, as well as those with protected characteristics, to improve engagement in their learning. Raising attainment at all levels and stages across schools is an improvement priority across the local authority. Education and Families Managers play a key role in supporting school improvement. The local authority is supporting schools to become more focused with their approaches to self-evaluation and quality assurance through the implementation of the local authority's quality improvement framework. This helpfully signposts potential support from within and beyond NLC, including Cluster Improvement and Integration Leads, the Learning Hub, West Partnership colleagues and Education Scotland Attainment Advisors to support improvement.

The local authority reports that self-evaluation materials are beginning to impact positively on school-based planning and development. Education and Families Managers are seeing more measurable outcomes in their annual improvement plans and headteachers are using more evaluative writing in their annual improvement reports.

There remains a degree of inconsistency in the approaches to self-evaluation and quality assurance across schools. The local authority is committed to continuing to support headteachers to develop further self-evaluation and evaluative writing skills. There are plans to strengthen the work of the Cluster Improvement and Integration leads to support improvement. Raising attainment at all levels and stages across schools is an improvement priority across the local authority.

Central officers, partners, the learning hub and innovation and improvement hub all

support the sharing of effective practice through well-planned strategic conferences. These include support and sharing good practice around learning, teaching and assessment, curriculum and building a culture of inclusion. There are plans to extend this offer moving forward.

Theme 3: How do local authorities support schools to improve the quality of education through professional learning?

- What professional learning does the local authority currently provide to support school improvement?
- What is the impact of this on developing the skills and knowledge of school leaders and staff on school improvement?
- What support systems (e.g., mentoring, networks of practice, peer support groups, cluster support) are available for school leaders and staff? How are these approaches improving school performance and outcomes for learners?
- To what extent do senior leaders have opportunities to support improvement beyond their own establishment? What difference is this making?
- How effectively does the local authority utilise Associate Assessors (if applicable) to support school improvement across establishments.
- Does the local authority's professional learning strategy draw on support from national organisations?

Local authority officers have developed a comprehensive offer of professional learning that supports school improvement. This is categorised under the headings of universal, additional and intensive support. This offer directly relates to aspects of the National Improvement Framework, QIs and individual needs that have been identified through both school and local authority self-evaluation. The wide range of high-quality professional learning opportunities supports the local authority in promoting their vision and values. It supports the development of what constitutes a high-quality provision for children and young people in North Lanarkshire.

There is an effective leadership framework in place that includes a range of induction programmes for newly qualified teachers, middle leaders, senior leaders and headteachers. These opportunities promote leadership and collaboration at all levels. Central officers report that the number of staff participating in the programmes is impacting positively on staff expertise and pedagogical practice. School staff speak very positively about how these programmes have supported them to develop their skills and abilities as leaders of learning. Local authority officers have developed a strong culture of professional enquiry which is now being used effectively to share good practice. The comprehensive suite of leadership and newly qualified teacher development opportunities promote leadership and empowerment at all levels, building overall staff capacity.

Central officers, partners, the learning and innovation hub and the improvement hub all support the professional learning offer. They do this through for example, well planned strategic conferences including 'Learning, Teaching and Assessment', 'Curriculum' and 'Building a Culture of Inclusion'. There are plans to extend this offer moving forward. The central team should now consider the impact of these

conferences on outcomes for young people alongside how best to evaluate the effectiveness and impact of the professional learning offer.

Partnership working is a strong feature of the professional learning offer. Aspects of the offer are well-planned with a range of partners. This includes educational psychology, social work and health to deliver bespoke career long professional learning to address service level and locally identified issues. This is supporting the development of positive collaborative working across sectors. There is a strong commitment to co-create training to support improved outcomes for young people, children and families.

The local authority has taken the decision to fund, through their Strategic Equity Funding, a number of staff to facilitate the core function of the authority's support to schools. This has created opportunities for collaboration and capacity building which in turn is supporting improved outcomes for young people. The helpful virtual school that works with care experienced young people has had measurable success in relation to improving outcomes for care experienced young people across the authority.

The local authority has also developed a successful 'Empowering Clusters' model to support improvement. This supports improvement in a more targeted and contextualised way. Cluster improvement priorities allow schools to collaborate to create shared priorities to address cluster level needs and build on strengths identified through collaborative self-evaluative activity. This model is supported very well by a wide range of partners, who have a strong shared understanding of the needs within clusters.

The development of a wider pedagogy team is supporting improvements in classrooms across the local authority. This team exemplifies in practice the research-based pedagogical approaches promoted by the Learning Hub, modelling good practice and is supporting staff to build their knowledge and expertise. This team is used in both universal and targeted ways to support improvements in learning, teaching and assessment and to support best practice in literacy, numeracy and STEM. Staff speak positively about the impact of the work of both the Learning Hub and the pedagogy team.

The local authority uses Education Scotland Associate Assessors (AA) well, working with EFMs and headteachers to support aspects of school improvement. Some examples of how AAs have been deployed include: mentoring peer headteachers; participation in quality improvement visits including VSE; support in other areas of improvement planning and; preparation for inspection. The local authority has engaged frequently with Education Scotland colleagues to provide coaching and mentoring support for headteachers. The local authority leadership programme has been endorsed by Education Scotland. This programme is recognised and supported both within and out with North Lanarkshire. Education Scotland's Attainment Advisor has supported schools with improvement planning and quality assurance. This is proving valuable to school leaders.

Through effective partnership working with the West Partnership and The Robert

Owen Centre, the local authority has engaged well with current research to review and develop new pedagogical approaches. Staff speak positively about participation in West Partnership collaborative 'Improving Our Classrooms'. Staff recognise that this engagement is having a positive impact on building staff knowledge and skills to supporting high quality learning, teaching and assessment. The central team should now consider how best to use the outcomes from quality assurance to inform the planning of local authority professional learning.

Theme 4: How do local authorities deliver universal support and challenge for all schools, and/or targeted support for specific schools to improve the quality of education?

- What is the universal offer of support and challenge for all schools?
 - How does the local authority use the data from individual school or cluster improvement plans and standards and quality reports, to provide targeted support?
 - What measures are used to identify the need for targeted support?
 - Is there targeted support for specific schools? What might that look like? (examples?)
- What action is taken if a review of a school concludes that a school is not performing satisfactorily and requires targeted support?
- What support systems (for example: mentoring, networks of practice, peer support groups) are available for school leaders and staff?
 - What is the role of central staff in facilitating/contributing to collaborative approaches, which improve school performance and outcomes for learners?

For all schools across sectors, there is a baseline, universal offer of challenge and support by central officers. This involves the input of other key partners from a range of local authority services, as well as colleagues from more formal networks of support who lead on supporting targeted aspects of school improvement. For secondary schools, most central officers provide headteachers with an agenda of areas of attainment they wish to examine and discuss in advance. Across primary schools, attainment discussions focus mainly on the robustness of Curriculum for Excellence levels (ACEL data). Local authority officers correctly realise the need to address inconsistencies in Curriculum for Excellence data across the whole broad general education (BGE). This work has begun and is ongoing. To support this, next session all schools will be able to access a huge wealth of rich data supported on a standardised platform. This is currently under development. Once embedded, this has the potential to be powerful in identifying and making links more explicitly, to areas of school performance that require immediate attention.

As a universal offer of resources for schools-based staff to access, there is a high-quality 'suite' of resources provided by the Learning Hub and central pedagogy and digital teams. This helps to ensure that teachers can access high-quality support and resources at a time that suits them to engage in these professional learning activities. The extent to which officers direct school leaders and other staff to these resources, explicitly dependent on key reasons for a school's RAG status, is currently inconsistent.

Central officers use data from schools' AIPs and AIRs, to inform levels of the support schools require. For example, a school's current RAG status for support and

challenge and their journey to improve this, is based around improvement progress, mostly stemming from these plans and reports. Where schools' RAG status and subsequent improvement plans highlight the need for higher levels of support, central officers engage with schools in a more intensive way until agreed improvement targets have been met.

Central officers use a number of measures and criteria to determine a school's need for different levels of additional or more intensive support and challenge. For example, where there has been recent turn around in school leadership positions, this would trigger more targeted support. Also, areas for urgent improvement or where additional resources for improvement have been identified through a school or cluster improvement plan, may also trigger more targeted support. Cluster chairs and cluster improvement leads, some of whom are seconded from schools to support improvement, play a key role in facilitating aspects of improvement for individual and groups of schools across clusters. Headteachers report that this support is invaluable in facilitating targeted improvement. These roles importantly are helping to develop the local authority's 'Empowering Clusters' model. There is evidence of the model having an impact on improving outcomes for individual children and young people, as well as for targeted groups, over time. The 'Empowering Clusters' model is a very good example of colleagues from across sectors and agencies, working collaboratively to support schools to improved targeted outcomes for children and young people. This is helping school leaders broker essential support and resources at a time when central resources are limited. This 'team around the school' model is proving to be positive in supporting school improvement.

Across the local authority, there are a number of well-organised support systems available to school leaders, staff and clusters. For example, the authority has six defined networks where headteachers and leaders broker targeted areas of high quality support. These networks include: central officer support; a curriculum pathways team; a dedicated pedagogy team; the learning hub; the wider Scottish Attainment Challenge (SAC) team and the 'Empowering Clusters' team. These more formalised networks are at different stages in their inception. Collectively, they design their offers based on core, universal support. For example, deployment of universal SAC resources support and enhance additional cluster resources. They also provide more targeted, bespoke support to schools and clusters where required. Strong partnerships have developed through the central networks of support to schools. For example, education psychology, social work and CLD colleagues are working collaboratively and effectively, to provide universally agreed and targeted support to schools as required.

Moving forward, senior officers are aware of the need to enhance their own self-evaluation of their support and the other networks of support, provided to schools. Aspects of this self-evaluative work in the central team have already begun. This will help central senior officers to define the impacts more clearly of the targeted and universal support they provide to schools.

North Lanarkshire Council Report

Education, Children and Families Committee

Does this report require to be approved?

☐ Yes ☒ No

Ref BS / JM

Date

20/05/25

Review of Education and Families Service Operating Structures

From Barry Smedley and James McParland, Chief Officers (Education)

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Executive Summary

Education Authorities have a duty, as outlined in the Education (Scotland) Act 2016, which amends the Standards in Scotland's Schools etc. Act 2000, to continually endeavour to improve the quality of education provided in the schools managed by them.

In North Lanarkshire, the Education and Families (E&F) Service aims to provide the highest quality education services for our children and young people. However, it is understood that Education cannot, and should not, operate in isolation.

It must operate as part of a broader range of services delivered across North Lanarkshire (NL), that aim to ensure inclusive growth and prosperity for all to bring equal benefits and a fairer distribution of wealth to all North Lanarkshire's people and communities.

Therefore, the contents of this paper should be understood in the wider context of the E&F Service's contribution to the overarching ambitions outlined in The Plan for North Lanarkshire and Programme of Work, particularly in relation to Brighter Futures and Resilient People programmes.

This paper offers an overview of an ongoing service review aimed at assessing current progress and identifying new opportunities to enhance achievement, promote equity, and improve outcomes. The goal is to ensure all learners transition successfully to positive post-school destinations that are sustainable in the longer-term. This will be supported by bolstering the central team's capacity and support, contributing to improvement efforts at the establishment, cluster, and community levels.

Furthermore, the paper outlines a strategy for a new operating model that emphasises locality-based leadership. This approach focuses on building relationships and preventative measures, placing children, families, and communities at the centre of planning. The model aims to improve the Service's ability to respond to local needs, integrate practices, improve attainment, and enhance long-term outcomes for children, families, and communities in NL.

The paper is intended to stimulate discussion and offer the Education and Families Committee the opportunity to comment on the developing approach, to help shape and inform future operating models.

This report is split into three parts for ease of reference:

- Part 1 of the paper provides context by summarising the impact of The Plan for North Lanarkshire and Programme of Work at local authority and subsequently service level.
- Part 2 focuses on the evolution of the Education and Families Service in response to local and national policy developments.
- Part 3 of the report focuses on the current, and proposed new operating model for Education, within the broader Education and Families Service.

Recommendations

It is recommended that the Education, Children and Families Committee:

1. Endorse the revised operating model for the Education and Families Service.
 2. Acknowledge the cost implications as outlined in 2.81.
 3. Acknowledge the next steps as outlined 2.82.
-

The Plan for North Lanarkshire

Priority	Support all children and young people to realise their full potential
Ambition statement	(6) Raise attainment and skills for learning, life, and work to enhance opportunities and choices
Programme of Work	Brighter Futures

1. Background

- 1.1 The Standards in Schools Act (2000) places specific responsibilities on the Local Authority to improve the standards in schools. Specifically, it requires Local Authorities to:
 - Promote a reduction in inequalities of educational outcomes experienced by pupils due to socio-economic disadvantage.
 - Secure improvement in the quality of school education, aligning improvement and reporting activity with the strategic priorities identified in the National Improvement Framework.
- 1.2 To achieve these objectives, education must be viewed in its broadest sense; as the process of facilitating learning, acquiring knowledge, skills, values, beliefs, and behaviours. This includes formal teaching in educational establishments, as well as informal learning experiences gained through life, work, and social interactions. The overarching aim of education is to prepare children and young people to contribute effectively to society and lead fulfilling lives.
- 1.3 It is recognised that to achieve this aim, the E&F Service must collaborate and align service objectives within the wider, overarching objectives outlined in The Plan for North Lanarkshire, to remove barriers, address inequalities and ensure children, young people and families are appropriately supported through a relationship based, person-centred approach. This collective commitment permeates all aspects of The Plan for North Lanarkshire. It demonstrates how strategic decisions to integrate and align approaches within the Programme of Work and the broader Children's Services Plan 2023-2026 are enhancing service delivery and, consequently, improving outcomes for children and families.

- 1.4 To exercise our responsibilities in relation to statutory duties, and to contribute effectively to NL's overarching aim to ensure NL is a place to Live, Learn, Work, Invest and Visit, the E&F Service has established a central operating model/structure.
- 1.5 However, like many other services across NL, this structure has changed and evolved. This paper summarises the evolution of the Education central structure over time, in response to local and national policy drivers and financial pressures. It highlights strengths, identifies risk, and outlines the Service's proposal to refine and create a new operating model that gives the Service the flexibility to continue to respond to local needs, strengthen integrative practice, raise attainment, and improve long-term outcomes for children, young people and their families within NL.
- 1.6 This paper focuses specifically on Education within the wider integrated service operating model whilst recognising there are further opportunities to strengthen existing collaborative practices and improve outcomes for children, families and communities.

2. Report

Part 1: The Plan for North Lanarkshire and Programme of Work

- 2.1 The Plan for North Lanarkshire, established in 2019, aimed to ensure inclusive growth and prosperity for all to bring equal benefits and a fairer distribution of wealth to all North Lanarkshire's people and communities. It was endorsed by all Community Planning Partners including NHS Lanarkshire, Police Scotland, Scottish Fire and Rescue and Voluntary Action North Lanarkshire, as a shared ambition.



- 2.2 Implementation of The Plan signified the start of the transformational change programme for the place that is North Lanarkshire which had, at its core, a one council approach that endeavoured to break down silos to create an integrated, council wide service delivery model that improved efficiency and the ability to provide the right support at the right time, for children, families and communities.
- 2.3 It is recognised within The Plan that improving the lives of people and communities involves creating positive social and economic conditions, through a place-based approach. This includes maintaining a healthy population, attracting and sustaining a balanced demographic, and drawing investment to generate jobs, businesses, and housing. By developing vibrant town centres and innovative employment pathways and providing holistic support for families during key life transitions, NL aims to reduce poverty and foster self-sufficiency, ultimately boosting the local economy.
- 2.4 The Plan emphasised the necessity for all council and partner services to work collectively to make a positive difference for children, families and communities, across NL. The diagram below exemplifies some of NL's key objectives, as outlined within The Plan. Notably, these objectives are not service specific; they present our collective

ambitions and outcomes. Achievement of these objectives requires meaningful collaboration and integration between, and across, services and partners, including E&F.



2.5 Since its inception, The Plan has strengthened synergies across services and embedded integrated approaches to service re-design and delivery. Subsequently, this has led to several significant successes including those outlined below. These achievements are particularly noteworthy given the challenging post-pandemic context in which they were accomplished.

2.6 Successes:

- Latest data indicates that the gross weekly pay for North Lanarkshire's residents has reached £740.40, compared with £740.00 nationally.
- Employment-related benefit claims have decreased by nearly 48% since 2020 and NL's latest data indicates that that is now 8% lower than the baseline set.
- Economic growth continues to show a positive picture with the latest results showing an increase of 9% in gross value added per head, since the previous year. This marks a significant improvement from a -3.1% growth rate during the pandemic to +8.9% over the past two years.
- £47,935,822 income from social security benefits has been generated for residents. This is +35% since 2022-2023.
- 30 children have been supported to stay or return home through family group decision making for better outcomes - avoiding c.£1.6m in costs.
- School exclusion rates continue to show significant improvement overall for all pupils, and specifically for Care Experienced Learners. NL's exclusion rate for Care Experienced Learners is now the sixth lowest in Scotland.
- Within the primary education sector, attainment in literacy and numeracy continue to show improvement, exceeding national attainment figures, when comparing P1, 4 and 7 combined data for literacy and numeracy.

2.7 The success of The Plan is unequivocally linked to the strategic approach taken across services to ensure our children, families and communities benefit from a place-based, one service approach, which focuses on improving outcomes and economic regeneration. However, the position remains fragile and therefore susceptible to any wider (and uncontrollable) economical or environmental impacts on society. Therefore challenges, including those outlined below, remain:

2.8 Challenges:

- Child poverty remains high, with almost one in four children living in poverty, compared with just over one in five nationally.
- 28,616 pupils live in SIMD1-4 (second highest in Scotland)
- Educational qualifications: 21% of the working-age population have no formal qualifications.
- Economic inactivity: It is estimated that almost 54,000 of the working age population (24.9 %) are economically inactive, with many long-term sick or not actively seeking employment.
- While the change in recorded crime in North Lanarkshire has increased to 4%, higher than the national average (3.6%), the number of crimes recorded by the police has not returned to pre-pandemic levels and remains lower than The Plan for North Lanarkshire baseline.
- Over 34% of young people within NL have an additional support need.

2.9 At the meeting of Policy and Strategy Committee on 16 March 2023, 'The Plan for North Lanarkshire – Programme of Work to 2028' was approved. The 28 Health Check Indicators contained within The Plan and Programme of Work provide clear measures that are used to track progress. They remain crucial in guiding the implementation of the Programme of Work delivery plan in line with The Plan for North Lanarkshire. They ensure data is used effectively and transparently to inform and drive resource allocation, policy developments, continuous improvement, and the transformation of North Lanarkshire.



2.10 Noting the challenges outlined above, it is imperative that services, including the E&F Service, individually and collectively, continue to evolve and respond to needs, building resilience and ensuring sustainable improvements, by leveraging community assets and strengths.

2.11 Schools represent the biggest investment in infrastructure across North Lanarkshire. They are also at the heart of towns and communities. Given the ambition to replace every school not replaced or remodelled since 1996, NL's vision is to make these places for the whole community rather than only the school community. The council is also committed to the Leadership and Operating Model, which integrates service delivery of multiple council and partner services as close to communities as possible through community hubs.

- 2.12 Community hubs act as a gateway for early intervention, preventative support and targeted activities based on local need, co-locating schools and a range of council and partner services. Hubs allow better engagement with local communities and provision of services at all stages of life and help to meet the objectives of each Local Outcome Improvement Plan. The range of activities in hubs is based on local need and the sharing of intelligence and best practice across council services and with partners. The range of services across the hubs includes:
- whole family support
 - community learning and development
 - housing support
 - Tackling Poverty activity
 - social work
 - employability support
 - active and creative communities
- 2.13 For example, since opening in June 2024, the Chryston Community Hub has become the cornerstone of the local community. It provides the local community with access to various support services, outdoor amenities, and enhanced leisure and recreational facilities. Inclusive learning environments and state-of-the-art facilities are available for children, young people, and community members. The operating model within the Chryston Hub offers clear benefits for education and health colleagues, and for members of the community, at all ages and stages.
- 2.14 With the Health Clinic located on site, health, education professionals and wider partners have gained valuable opportunities to collaborate and address community issues together. Notably, Chryston Primary School was the first primary school in NL to achieve the 'Breast Feeding Friendly' award; an award achieved with support from partners in health and community learning and development. Building on the success of this programme, 85% of NL's educational establishments have now achieved this award. Furthermore, North Lanarkshire was the first local authority in Scotland to receive the Gold Level Breastfeeding Friendly award in February 2024. This exemplifies how our educational estate and community hubs are empowering services to respond to local needs by mobilising assets and strengths across communities in North Lanarkshire.



Part 2: Evolution of the Education and Families Service

- 2.15 The creation of the E&F Service resulted in a significant change to education and social work operating models. The service has continued to evolve to date, and includes services such as, Education Services, Children's Services Social Work, Justice Services, Community Learning & Development, and Tackling Poverty Team, among others.

- 2.16 Bringing social work and education together allowed both services to better align resources and approaches to tackle complex issues in a more holistic, integrated way that empowers families and leads to more sustainable and tangible improvements.
- 2.17 The E&F Directorate identified several areas where provision would be subject to restructuring including the introduction of bespoke posts aligned to SNCT conditions of service. Key changes in relation to Education included:
- Redesignation of Education Officer (NLC18) to Senior Education and Families Manager (SEFM), x 3FTE (subsequently reduced to 2FTE)
 - Deletion of Continuous Improvement Manager Post
 - Continuous Improvement Officers (CIO) reduced from 12 to 3
 - Creation of 8 new posts of Education and Families Manager (EFM) benchmarked to Continuous Improvement Manager salary scales.
- 2.18 Appendix 1: Provides an overview of the evolution of the service operating model since 2015.

Education and Families Operating Model: 2025

- 2.19 Table 1 below provides an overview of the pay and grades associated with the education roles that are within the current 2025 operating model. (It does not contain information in relation to social work/family roles.) Notably, the number of Education and Families Manager (EFM) posts increased to nine permanent posts from August 2024, with one additionally funded via Scottish Equity Funding (SEF). Table 2 summarises the overall Education and Families workforce for session 2025-26.

Table 1

Designation	FTE	Grade @ 1.4.24	T&Cs
Senior Education & Families Manager (SEFM) (redesignated from Education Officer)	2 perm 1 temp	NLC18	Single Status
Education & Families Manager (EFM)	9 perm 1 temp	QIM	Teachers (SNCT)
Continuous Improvement Officer (CIO)	3 perm	QIO	Teachers (SNCT)

Table 2: E&F Overall Workforce 2025

	FTE	Head Count
Services managed by 2 x Chief Officers (Education)	6,846.51	8,033
Services managed by Chief Social Work officer	798.98	949
Total	7,645.49	8,982

- 2.20 The introduction of the EFM post marked a significant advancement in the operating model, expanding officers' operational and strategic roles to strengthen collaboration across clusters and partnerships with various services. This change aimed to improve transition processes and ensure an equitable distribution of resources and opportunities to improve outcomes for children and families. Consequently, officers took on responsibility for a greater number of educational establishments.

- 2.21 EFMs and SEFMs play a key role within the operating model. As Senior Officers of the Council, EFMs have a specific focus on providing appropriate challenge to empower school leaders to drive forward improvements. They also have a responsibility for key improvement activity including but not exclusively, contributing to NL's programmes of work and authority wide self-evaluation and reporting processes. They provide direct line management for 118 primary and 13 ASN headteachers. (Chief Officers line manage the 23 secondary headteachers). They engage in cluster wellbeing meetings, collaborating with other services and partners to support integrated approaches, and contribute to improvement activity supporting meaningful improvements within local communities.
- 2.22 EFMs monitor the implementation of the Service's quality improvement framework and processes. They provide essential support and challenge, in all aspects of the improvement cycle, to maximise impact and to create an ambitious and effective model of school improvement that supports improved attainment and outcomes for learners. This includes leading and coordinating internal and external scrutiny activities including attainment reviews, validated self-evaluation (VSE) visits and HMle inspections.
- 2.23 During the recent Education Scotland Thematic Inspection, it was noted that the systems and processes outlined within the Service's quality assurance (QA) processes were effective and that *'almost all headteachers report that they receive a rigorous balance of support and challenging dialogue that helps to inform directly improvement priorities.'* However, the inspection team recognised the challenges faced by officers to ensure consistent, high-quality support and challenge for establishment leaders – *'There is a need to balance the desire within the central team to be responsive to demand with their own capacity to deliver support.'*
- 2.24 It should be noted when introduced in 2019, the Senior Education and Families Manager (SEFM) earned around £4k more compared with the Education and Families Manager (EFM), in keeping with the hierarchy of the management operating model, at that time. However, over recent years, the rate of teachers' pay awards has overtaken single status, resulting in the reverse effect, with EFMs now earning around £1,532 more. This is not the only grading anomaly across NL but is relevant in this context.
- 2.25 Since its inception, the E&F Service has effectively adopted a values-driven strategic approach to service delivery. This approach encompasses addressing poverty and inequality, fostering positive wellbeing and inclusion, enhancing cultural capital, and establishing effective pathways to employment.
- 2.26 New ways of working have been developed within, and across existing structures, building capacity to support children, young people and families, more holistically through partnership working, and service re-design. Across the Service, strategies and approaches taken are underpinned by The Promise, Getting it Right for Every Child (GIRFEC) and Getting it Right for Everyone (GIRFE).
- 2.27 The development of more integrated approaches and creative use of core and external funding streams, such as Scottish Attainment Challenge (SAC) funding, Whole Family Wellbeing Fund (WFWBF) and Community, Mental Health and Wellbeing Fund (CMHWBF), has enabled the Service to pilot and upscale new service delivery models and approaches, that place children and families at the heart of planning processes, thus achieving better outcomes. The approaches taken have optimised the use of available resources, with a focus on enhancing outcomes for families.
- 2.28 The examples in paragraphs 2.29 to 2.37 below exemplify how the E&F Service has developed, and is continuing to develop, innovative and integrated approaches that

align and maximise use of available resources to address challenges and improve outcomes. Whilst acknowledging Education contribute to the examples included below, the new proposed operating model will increase capacity and enhance opportunities for greater collaborative working as these initiatives are primarily led by officers from other areas of the service. Further benefits are summarised in 2.40 below.

Neurodevelopmental Family Support Workers

- 2.29 Recognising the challenges that children and young people who are neurodivergent may experience engaging with school, compounded by the stress experienced by families waiting for formal assessment, the Service funded neurodevelopmental family support workers to provide additional targeted support for families. Identified families were offered a range of 1:1 and family-based supports at home, in the community, or in school. 100% of families involved reported improved outcomes and only 35 of initial referrals progressed on to a further referral to social work or Child and Adolescent Mental Health Services (CAMHS).
- 2.30 As part of this initiative, NHSL Neurodevelopmental Service, Educational Psychology, and Carers Together launched a pilot project across two clusters. The focus was on children from Primary 7 to S2, aiming to prevent the emerging trend of neurodivergent young people disengaging from school during this period. Almost all children involved in the pilot made a successful transition from primary to secondary school.

Income Maximisation: Additional Support Needs Sector

- 2.31 In March 2024, nine Additional Support Needs (ASN) schools collaboratively used Pupil Equity Funding (PEF) to employ a dedicated Welfare Rights Officer (from NL's tackling Poverty Team) on a temporary basis (August 2024 to June 2025) to provide an income maximisation service to the families of pupils attending identified ASN schools. Most schools within the pilot opted to use a targeted approach, focusing on P1 and S1 pupils. To date, the total income generated for identified families, through this direct contact approach, is £116,367, with a further 49 claims awaiting an outcome.
- 2.32 The Tackling Poverty team aims to leverage the success of this pilot by continuing to work closely with colleagues to create a sustainable model for service design and delivery. This model will support efforts to reduce child poverty and enhance family well-being through whole family support.

Virtual School (VS)

- 2.33 The Virtual School continues to make significant progress in reducing the number of exclusions for Care Experienced Learners, with NL's exclusion rate for Care Experienced Learners now being the sixth lowest in Scotland. However, the VS team are also increasing opportunities and support for Care Experienced Learners to achieve more.
- 2.34 During session 2023-24, central SAC funding was used to enhance teacher allocation for the VS team with a view to increasing opportunities for learners to achieve more formal National Qualifications in the Senior Phase. 27 young people were supported in session 2023/24 to achieve 88 National 3 or 4 qualifications across eight curricular areas. A Virtual School improvement priority has been agreed for session 2024-25 which sets a target of 60% of S4 learners, working entirely with the Virtual School, achieving a minimum of five full SQA course awards. 72% of this group are currently on track to achieve the target set. Improving qualifications for these young people will improve the likelihood of them progressing to a positive post-school destination.

Family Engagement Support Assistants

- 2.35 Although attendance rates increased across all sectors in academic session 2023-24, improving attendance remains a key priority. Notably, there is still a clear discrepancy between attendance rates of pupils in our most and least deprived areas, with young people in our most deprived areas less likely to attend school regularly.
- 2.36 To support improvements in this area, SAC funding has been used to invest in Family Engagement Support Assistants (FESAs). FESAs offer practical family support such as supporting families to establish routines, linking with the Tackling Poverty Team and facilitating communication with schools. Over session 2023-24, FESAs completed work with 192 children and their families. As a result of support provided, the FESAs prevented and/or stopped the declining attendance trend for 21% of young people and improved attendance rates for a further 56% of young people. Only 23% of the young people identified progressed to requiring intensive level support. This evidence supports the positive impact of early identification, intervention and family-based supports.
- 2.37 While noting the positive examples outlined above, the Service continues to face significant challenges in relation to wellbeing, inclusion, attendance and attainment. Therefore, the Service must respond appropriately to address these areas, removing barriers to achievement and ensuring excellence and equity for all children and young people.

Part 3: Current and Proposed New Operating Model

- 2.38 Part 3 of this report demonstrates how the Service plans to tackle these challenges through Service redesign within the E&F central Education team. It outlines a strategy to enhance the current operating model, optimising resources, efficiencies, and expertise across all operational and strategic functions. This aims to improve the wellbeing of children and families, raise attainment, improve attendance, and ensure equitable opportunities for all, through effective integrated service approaches.
- 2.39 Although this section of the report focuses primarily on the Education central team within Education and Families, it is important to emphasise that this proposal seeks to reinforce the E&F service in its totality, by strengthening the existing synergies and effective integrated practice that already exists between education, children and families and wider partners. In its simplest sense, this proposal would facilitate better alignment with other services and locality models. It would enable better alignment of E&F managers to the Empowering Clusters model, described below, to achieve better cohesion.
- 2.40 The proposed model will enable EFMs to better contribute to improvement activities at the establishment, cluster, and community levels, leveraging the Service's potential to enhance early identification, intervention, and prevention strategies, prioritising children and their families in decision-making to ensure the best possible start in life. The model will also strengthen EFMs' capacity to address audit recommendations to strengthen and enhance governance procedures around aspects of financial management (DSM) and procurement. This model offers a holistic perspective on education, emphasising its role in improving outcomes for children and families across all stages and contexts. Special focus will be on developing leaders capable of overseeing integrated services, including multidisciplinary teams and community leadership models.

Strengthening the Empowering Clusters Model

- 2.41 It is expected that all children and young people will benefit from universal supports and curricular experiences that foster positive health, wellbeing, and academic achievement, however, it is acknowledged that, at times, young people and families require additional or intensive support. Within NL, processes have been developed that enable support to be delivered through effective partnerships and integrated cluster working. This is referred to as the Empowering Clusters model. This model strengthens capacity to ensure that children and families have access to the correct supports, at the correct time, in their local community, placing children and families at the heart of our planning processes.
- 2.42 Key drivers for the Empowering Clusters model include Getting it Right for Every Child (GIRFEC), Tackling Poverty, Whole Family Support, Equity, Improvement, Inclusion, and Curriculum, Learning, Teaching and Assessment (CLTA). Since its inception in 2020, the effectiveness of the Empowering Clusters model in facilitating integrated practice and in improving outcomes for children and families has been recognised through several external inspection processes including the Joint Inspection of Children's Service's inspection, ADES collaborative improvement activity and Her Majesty's Inspectorate of Education (HMIe) National Thematic Inspection on Improvement.
- 2.43 Whilst the operational function of the cluster will remain the same, the Service's plan is to reduce the number of Empowering Clusters from 23 to 15 to better align with locality operating models. This will strengthen our ability to integrate further and respond collectively, with internal and external partners, to locality-based issues. The same children, from the same area, albeit at different schools, will benefit from an enhanced resource with a specific focus on whole family support, further strengthening, what is, an already effective integrated approach between services. New clusters will be expected to schedule termly 'Empowered Cluster' meetings, providing a forum to collaborate, share expertise and resources to respond to locality needs. Locality based planning for children's wellbeing meetings will further strengthen integrated working with partners and allow for trends and patterns to be identified and addressed more timeously, across localities. Reducing the number of clusters will allow for greater depth of discussion and collaboration, at locality level.
- 2.44 This proposal to reduce the number of clusters to 15 was recently approved at E&F Senior Management Meeting. It is intrinsically linked to the proposed Service redesign outlined below, which aims to bring the number of EFMs into better alignment with the new Empowering Cluster model, for the reasons outlined above. It is envisaged that aligning the Empowering Cluster model with the overall E&F operating structure, will provide better cohesion and strengthen self-evaluation for continuous improvement processes, and further enhance collaborative working and integrative practice.

Current Management Operating Model

- 2.45 Table 2 provides an overview of the postholders who form part of the current central team operating model. There are two permanent SEFM posts in the current structure and one additional temporary post, introduced in July 2024. Funding for this third post has been temporarily vired from HQ budgets for 23 months, approved via the Council's Workforce Change Steering Group in July 2024. The remits were realigned as follows:
- Inclusion and Early Learning and Childcare Lead (Permanent)
 - Quality and Improvement Lead (Temp funding for 23 months, as above)

- Business Solutions, Risk, Audit and Compliance Lead (Permanent position – appointment for 12 months fixed term)

2.46 There are currently nine permanent EFM posts in the structure, plus one additional temporary post funded via SEF until June 2025.

2.47 Within our current model, CIOs do not have line management duties or responsibility for a cluster of schools. Their role is to support inclusion activity.

Table 2: Education and Families Service (N.B. this report does not include information related to Social Work)

POSN	In Post	FTE	Grade
Chief Officer	Perm	2	HOS 2
SEFM	Perm	2	NLC 18
SEFM	Temp	1	NLC 18
EFM	Perm	9	QIM
EFM	Temp (SAC)	1	QIM
CIO Inclusion x3	Perm	3	CIO

Proposed Benefits of Creating a New Operating Model

2.48 There is an acknowledgment that the Service plays a crucial role in contributing to the Plan for North Lanarkshire, particularly in influencing and improving Health Check Indicators and the detailed data that sits behind them. Over the next 5-10 years, the service has identified several key improvement priorities taking cognisance of local and national challenges. Addressing inequality and poverty is essential for making progress in these areas. It is recognised that whole family support significantly contributes to tackling these issues, and schools alone cannot secure the necessary improvements whilst working in isolation. An integrated approach, multi-service collaboration, and strong partnerships that target interventions for families and improve outcomes for children and young people, is required to secure sustainable improvements.

2.49 The Service recognises that within the current operating model, there is significant inconsistency in the level of support and challenge provided to school leaders across the school estate. This is due to various factors including, differences in the number of establishments supported by EFMs, and the capacity to balance operational and strategic demands, ensuring core functions are delivered consistently. This presents risks to the Service in terms of quality assurance, governance and the Service's overall capacity to support integrated practices, raise attainment and improve outcomes for children, young people and their families.

2.50 Since the introduction of the EFM post, the local and national context has changed. Although the EFM role has evolved in response to these changes, the Service recognises the need to conduct a further review of the structure, to ensure it has the capacity to implement the Service's Raising Attainment and Achievement Strategy, which supports the wider objectives outlined in The Plan for North Lanarkshire.

2.51 At present, attainment within the primary sector is positive with NL comparing favourably with comparator LAs. Arguably, this is because the service deployed additional resources and support into this area; focusing on early identification and intervention to improve attainment and reduce gaps. Data indicates that this approach has been successful and has led to improved attainment levels and outcomes, in this sector.

- 2.52 However, in session 2023-24, performance declined across all measures in the Senior Phase, aligning with the national trend. Although some progress is evident in attainment at the S4 stage, further improvement is required in several key measures in the Senior Phase. Therefore, the proposed model will ensure this remains a key priority for the Service.
- 2.53 Therefore, the proposal to modify the current operating model offers advantages in two key areas: enhancing capacity to support and integrate partnership approaches to equity and achievement and strengthening the EFM team's ability to drive improvements at establishment level. This will be achieved by providing consistent, high-quality support and challenge to their assigned schools and clusters, with the aim of raising attainment and achievement, and closing the poverty-related attainment gap.
- 2.54 To support this, we propose to increase the number of central officers and establish a small resources team who will assume responsibility for some of the key service level activities, aligned to effective service delivery, but not directly linked to the Service's approaches to raising attainment.
- 2.55 Streamlining the responsibilities of EFMs, by re-aligning aspects of operational functions to the newly created resources team, will provide several advantages to service delivery, as outlined below.

Enhanced Focus

- 2.56 Restructuring EFM remits to align with the new Empowering Cluster model (15 locality clusters) will enable EFMs to contribute more effectively to locality-level improvement activities, addressing local issues and improving outcomes for children and families. This restructuring will also increase the EFM team's capacity, allowing officers to prioritise core strategic and operational roles and responsibilities, drive service-level improvement activities, and provide direct, high-quality support to headteachers and leadership teams. Consequently, this will lead to more effective and efficient service delivery, raise attainment and improve outcomes for learners.

Improved Quality of Support

- 2.57 EFM remits will be revised to better align with the Service's strategy for raising attainment and achievement, which supports the overarching goals of The Plan for NL. By reallocating specific business aspects of the EFM remit to the central resources team, officers will be able to devote more time and resources to their primary functions: supporting locality-level improvement activities and providing high-quality support and challenge to schools and establishments. This will facilitate improved outcomes for children and families.

Increased capacity and consistency

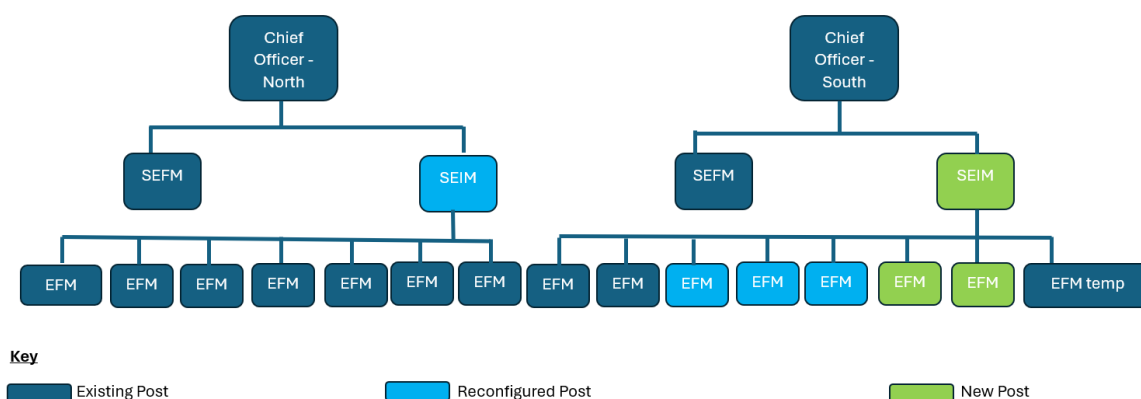
- 2.58 It is the Service's ambition to implement an operating model that results in EFMs having circa 12 establishments, as currently, some EFMs have responsibility for 19 establishments. The recent National Thematic Inspection by Education Scotland highlighted this as a key factor that contributed to an inconsistent level of support and challenge being offered to establishments by central officers. The introduction of two new Senior Education and Improvement Managers will add a strategic layer of governance and quality assurance to the central team. This will ensure better alignment, oversight, and moderation of the quality and consistency of support and challenge provided by the Service.

Specialisation and Expertise

- 2.59 By increasing the number of officers, remits can be reviewed and updated, maximising skills and expertise within the central team. This approach will build capacity across the team and ensure that our children, young people and families benefit from the officers' specialisms and knowledge.
- 2.60 As noted above, the Service also recognises the need to strengthen support around governance and compliance to ensure best practice and to adhere to audit recommendations. Therefore, the proposal to create a resources team is expected to offer the following benefits:
- **Enhanced collaboration and alignment of strategies**
A resources team can facilitate better communication and collaboration among different aspects of the Service, leading to more cohesive and coordinated efforts.
 - **Efficient resource allocation**
A dedicated team will ensure that resources are allocated appropriately and managed efficiently in accordance with the Service's Raising Attainment and Achievement Strategy. This team will enhance governance processes, optimise budget efficiency, and minimise risks to the Service.
 - **Improved project management**
The resources team will bolster the Service's existing project team by serving as a liaison between various cross-service teams, ensuring that all projects are managed according to the Council's project management framework. This team will collaborate with other services to oversee the planning, scheduling, and tracking of resources, ensuring that projects remain on track and within budget.

Proposed Operating Model

- 2.61 Prior to identifying the proposed operating model, officers conducted a robust options appraisal to determine the most effective and efficient operating model for the Service. The preferred option is outlined below. The model includes proposals to introduce new posts and to realign current posts.
- 2.62 For the purposes of this paper, the Families/Social Work aspect of the model has not been included, even though it is a crucial part of our integrated operating model. This is due to officers within this part of the Service not being directly impacted, at this time, by the redesign. However, potential scope for a further phase of work, to support the continued integration and strengthening of delivery across the full-service operating model, will be a priority moving forward.
- 2.63 Therefore, based on the rationale and expected benefits to the Service, outlined above, the proposed operating model is illustrated in the diagram below.



Changes to structure:

Blue are reconfigured posts and Green are new posts.

Position	FTE	Comments
EFM	3	Existing CIOs re- configured to EFM.
SEIM	1	Replacing existing SEFM post
SEIM	1	New post created by realignment of existing budget lines
EFM	2	New posts created

2.64 As illustrated above, the new operating model, below Chief Officer level, would comprise of 18 FTE permanent posts: two SEFM (existing posts), one new SEIM post and one reconfigured, and 14 EFMs, all permanent to the structure. **Specific points of note are listed below:**

- (1.) By utilising agreed benchmarking mechanisms, the Service propose to design a bespoke role, Senior Education and Improvement Manager (SEIM), that allows us to specify the salary placement on the SNCT pay and grade model that is equivalent to a similar type of post. It is therefore proposed that this would be aligned to a DHT/HT grade 13. Approval via our JNCT mechanism would be required. To introduce two new posts at this level would cost circa £0.258m. As previously noted, introduction of this new role would strengthen oversight and governance with SEIMs assuming responsibility for coordinating and overseeing the effective implementation of the Service's Raising Attainment and Achievement Strategy.
- (2.) One FTE additional Temp SAC funded EFM is included in the diagram above in section 2.63, however, this is a temporary post due to end on the 30th of June 2025.
- (3.) Within this model, the Service is proposing to realign three CIO posts from the existing structure, to create a further three EFM posts through designation reconfiguration. By changing CIO posts to EFM posts, the identified officers can assume operational and strategic responsibility for a cluster of establishments, bringing the operating model in line with the new Empowering Cluster model.
- (4.) The affected staff would be subject to a ring-fenced interview process, similar to that of the 2019 exercise. If proceeding with this option, the Service would realign key functions associated with their previous inclusion remit across the team, to ensure

continued service delivery. This would increase the number of EFM posts from nine in the original permanent operating model to twelve, inclusive of the three new posts being redesigned from the CIO remodelling.

- 2.65 The proposed structure aligned to the management posts evidences a net cost/FTE increase of £0.402m/3FTE, as outlined in Appendix 3.
- 2.66 The effectiveness of this option relies on 16 out of the 18 officers line managing one of the 15 Empowering Clusters (EC), with the two SEFMs line managing the holistic ASN cluster due to the level of support required in this sector.
- 2.67 Furthermore, within this model, direct line management of 14 EFMs would be shared across the two SEIM posts. It's important to note the two SEIMs would not have responsibility for line managing a cluster as their role is for coordinating and overseeing the effective implementation of the Service's Raising Attainment and Achievement Strategy. They will also have responsibility for the coordination of all external inspection/validation activity. This will build capacity across the central team and improve consistency and quality of support and challenge for establishment leaders. It will strengthen the Service's overall ability to raise attainment and improve outcomes for children and families.
- 2.68 EFMs and SEFMs will be aligned to Empowering Clusters and Central Functions. Increasing the number of EFMs will facilitate better alignment of the 15 clusters across the 14 permanent EFMs and two SEFMs. Within this model, each EFM and SEFM will have line management responsibility for approximately 12 establishments.
- 2.69 As mentioned in 2.66, the two SEFMs will share responsibility for the Additional Support Needs (ASN) Empowering Cluster, providing bespoke strategic direction and support for ASN establishments. ASN is a significant area of growth nationally and locally therefore, it is prudent that the Service ensures it has the capacity to respond to the growing need in this sector, ensuring best outcomes for children, young people and families.
- 2.70 Early Learning Centres and Private Partner Providers will continue to be managed by Quality Officers (NLC14) under the direction of the EFM with strategic responsibility for Early Years.

Strengthening Inclusion

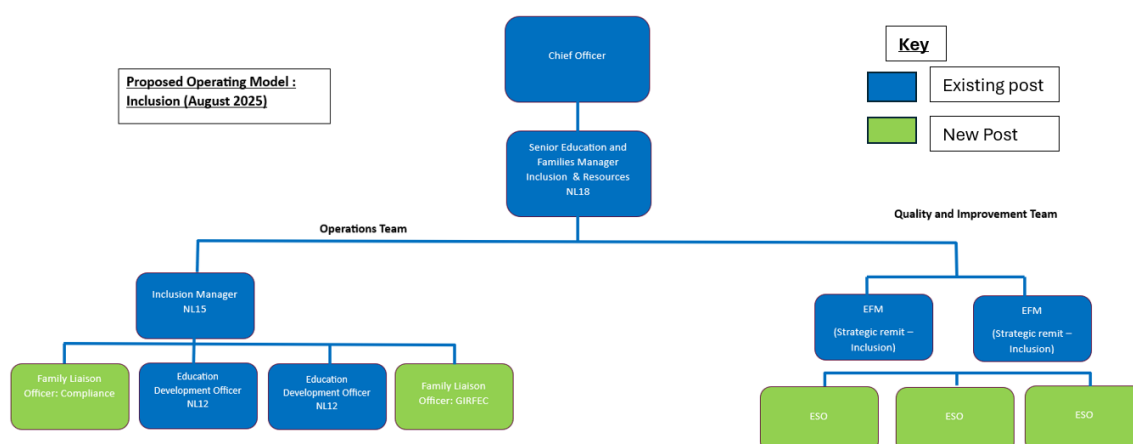
- 2.71 In Scotland there is a 'presumption of mainstream', established by Standards in Scotland's Schools etc. Act 2000, which means that, wherever possible, children and young people with additional support needs (ASN) should be educated in their local mainstream school, alongside their peers. Currently, approximately 34% of pupils in North Lanarkshire have an additional support need. Of these, 93% are educated in mainstream schools, reinforcing the need for comprehensive, robust support mechanisms within mainstream settings.
- 2.72 To address the growing need and provide equitable, inclusive education for all pupils, the Service is currently finalising its five-year ASN and Inclusion Strategy. This strategy outlines key objectives to enhance outcomes for children and young people with ASN. It aligns current local and national policy guidance, including insights from the recent Audit Scotland Report and The Morgan Review (2020), which emphasised the need for tailored, well-resourced provision to meet the diverse needs of pupils with ASN.

2.73 In its broadest sense, this strategy is designed to strengthen educational provision to ensure all children and young people with ASN are nurtured, included and empowered to thrive in all aspects of their lives. The strategy aims to do this by:

- strengthening inclusive practices
- maximising use of resources and partnerships to remove barriers and deliver holistic supports for families
- investing in learning estates
- building a skilled and resilient workforce
- ensuring all learners have access to high quality inclusive learning experiences and curriculum pathways that support them into positive post school destinations.

2.74 This strategy exemplifies the Service's plan to implement systemic changes, that will ensure NL's ASN provision is ambitious, effective, sustainable, and appropriately resourced to ensure high quality and improved outcomes for children, young people and families. The full strategy will be presented to SMT and Committee in due course.

2.75 Therefore, in addition to the proposed operating model changes outlined above, the Service is also proposing to decouple the Early Years (EY) and Inclusion strategic remit, assigning EY to one SEFM and Inclusion to another. This is particularly important considering the increased national and local focus on supporting inclusive practices and ensuring effective implementation of the Service's longer term strategic plan for inclusion within NL. The diagram below illustrates these proposals:



2.76 To support this new operating model the Service suggests the introduction of the following new posts, as outlined in the table below.

Post Title	Area	Grade
Family Liaison Officer (Compliance)	Inclusion	NLC12
Family Liaison Officer (GIRFEC)	Inclusion	NLC12
ESO X3	Inclusion	ESO X3

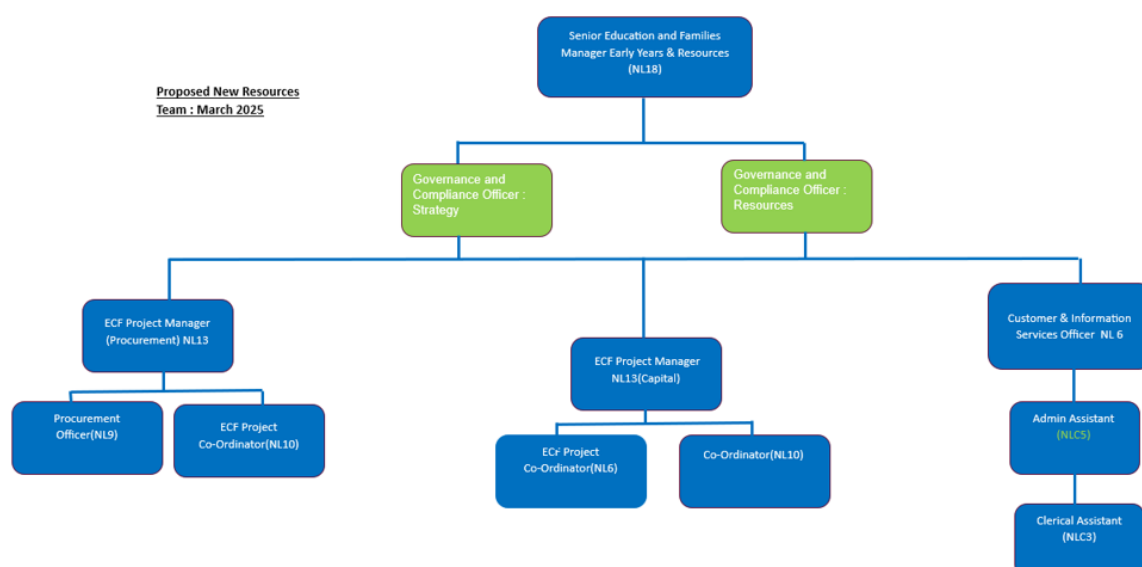
Resources Team

2.77 At present, Education has four teams who manage specific functions:

- Contract Management and Procurement
- Project Team

- Customer Service and Admin Team
- Contracts and Transport

2.78 Following approval by Council, the transport team will transfer to Enterprise and Communities early in academic session 2025-26. As part of this transfer process, the Service is currently reviewing all functions carried out by existing central resource-based teams. This is to strengthen operational capacity and to ensure continuity of service delivery across the remaining functions of this team. The Service is also seeking to create a resources team that will facilitate better alignment of core functions increasing efficiency, as outlined below.



2.79 To further strengthen the functionality of this team and to allow the Service to address recent audit recommendations, including the need to ensure better compliance with school fund procedures, the Service proposes the introduction of the following new posts:

Post Title	Grade
Governance and Compliance Officer : Resource	(NLC 14)
Governance and Compliance Officer : Strategy	(NLC 14)

2.80 The proposed structure evidences a net cost/FTE increase of £0.397m/5FTE and £0.156m/2FTE for the Inclusion and Resources teams respectively as outlined in Appendix 3.

Financial Summary

2.81 In summary, the proposals contained within the report will cost an additional £0.955m as outlined in Appendix 3. The funding source for each part of the proposal is summarised in the following table and has been confirmed by Finance:

	Cost (£000)	Funding Source
Management Structure (see para 2.65)	402	Prioritisation of service budgets, including funding previously set aside to manage service risks

Inclusion Team (see para 2.80)	397	Additional Scottish Government funding to support improvements in ASN service delivery
Resources Team (see para 2.80)	156	Allocated as part of the Council's 2025/26 approved revenue budget
Total	955	

Next Steps

2.82 It should be noted that this is the first phase of the Service Review, and a second phase will look at several different areas. Next steps include:

- The link to wider service management roles and structures aligned also to the agreed corporate review of third tier roles.
- Consideration of any additional changes in local delivery arrangements to accommodate the shift from 23 to 15 clusters.
- Consideration of the potential for greater alignment of business support functions across the service.
- Consideration of the potential for establishing a more integrated approach to the support of children with additional support needs across the spectrum of universal, additional and intensive supports. This will build on changes already made with regard to the integration of out of authority budgets and complex need pathways but will focus further on integrated approaches to the planning and delivery of support at universal and additional levels in line too with our focus on prevention, This will be informed by our learning from the Neurodevelopmental Family Link service and a planned Fairer Futures pilot aimed at addressing the disproportionate financial adversities faced by families of children with additional support needs. It will also involve further strengthening and alignment with work on carer support led through Adult Services and a review of our approach to Self- Directed Support within children's services. This will be an integral component of the ASN Service Review that will be reported to the Education & Families Committee in Cycle 3.
- Development and implementation of the Service's short, medium and long-term improvement priorities that will be reported to the Education and Families Committee in Cycle 3.

3. Measures of success

- 3.1 Better alignment and cohesion with the new Empowering Clusters Model which supports collaborative approaches and integrated practices.
- 3.2 Improved attainment and improved outcomes for children, young people and families.
- 3.2 More efficient deployment of officers to support the Service's Raising Attainment and Achievement Strategy.

4. Supporting documentation

Appendix 1: Operating model 2015-2025

Appendix 2: Proposed Education Operating Model Team Structures 2025

Appendix 3: Cost Summary: Proposed New Education Model

B Smedley

James McParland

Barry Smedley
Chief Officer (Education North)

James McParland
Chief Officer (Education South)

5. Impacts

5.1 Public Sector Equality Duty and Fairer Scotland Duty

Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty?

Yes ☐ No ☒

If Yes, please provide a brief summary of the impact?

If Yes, has an assessment been carried out and published on the council's website? <https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments>

Yes ☐ No ☐

5.2 Financial impact

Does the report contain any financial impacts?

Yes ☒ No ☐

If Yes, have all relevant financial impacts been discussed and agreed with Finance?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact?

The proposals outlined within this report have been reviewed by Finance with an appropriate, permanent funding solution identified. This funding solution includes the prioritisation of Service budgets; utilisation of additional, Service-directed, Scottish Government funding; and part-allocation of the funding included within the Council's 2025/26 Revenue Budget.

5.3 HR policy impact

Does the report contain any HR policy or procedure impacts?

Yes ☒ No ☐

If Yes, have all relevant HR impacts been discussed and agreed with People Resources?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact?

HR are aware of the implications of this Service restructure and are advising the service to ensure compliance with all policy and procedures.

5.4 Legal impact

Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)?

Yes ☐ No ☒

If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic?

Yes ☐ No ☐

If Yes, please provide a brief summary of the impact?

5.5	Data protection impact Does the report / project / practice contain or involve the processing of personal data? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, is the processing of this personal data likely to result in a high risk to the data subject? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk Yes <input type="checkbox"/> No <input type="checkbox"/>
5.6	Technology / Digital impact Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact? Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)? Yes <input type="checkbox"/> No <input type="checkbox"/>
5.7	Environmental / Carbon impact Does the report / project / practice contain information that has an impact on any environmental or carbon matters? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.8	Communications impact Does the report contain any information that has an impact on the council's communications activities? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.9	Risk impact Is there a risk impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed? Introduction of new the Operating Model should reduce the risks associated with Raising Attainment and Improving Outcomes as outlined in the Corporate Risk Register.
5.10	Armed Forces Covenant Duty Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the

Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.

5.11 Children's rights and wellbeing impact

Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?

Yes ☒ No ☐

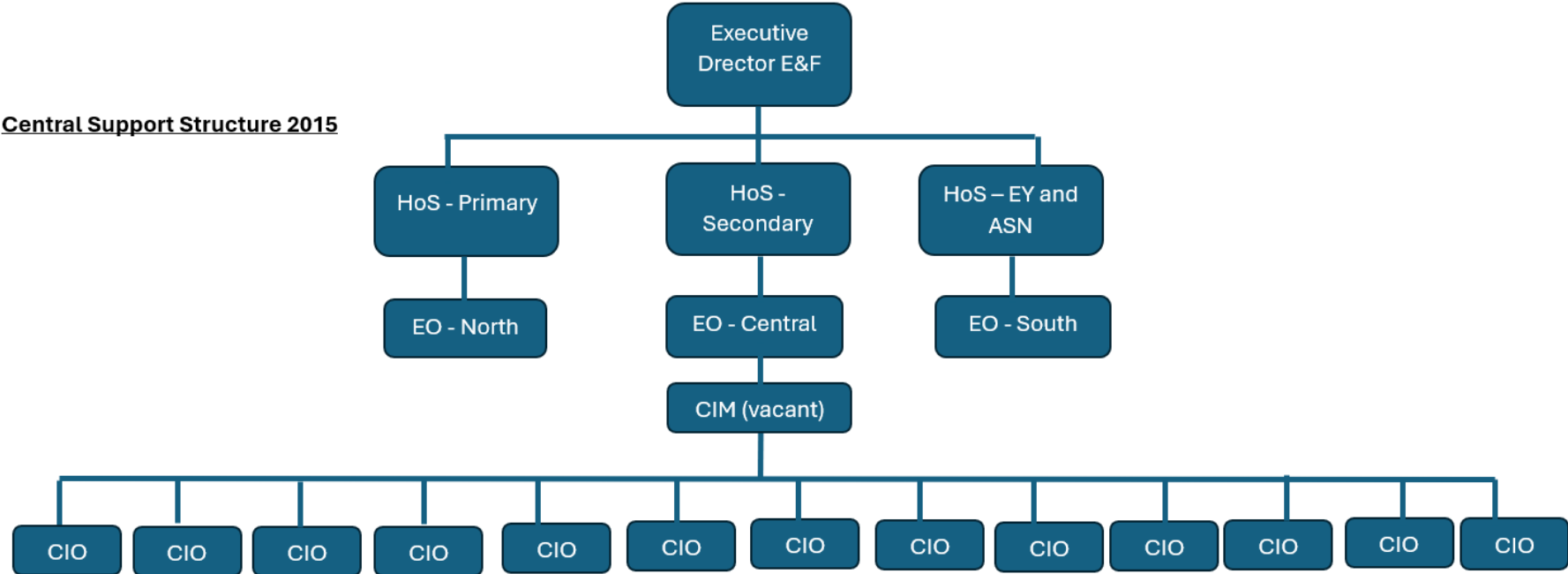
If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC). If approved, a CRWIA will be completed.

If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?

Yes ☐ No ☐

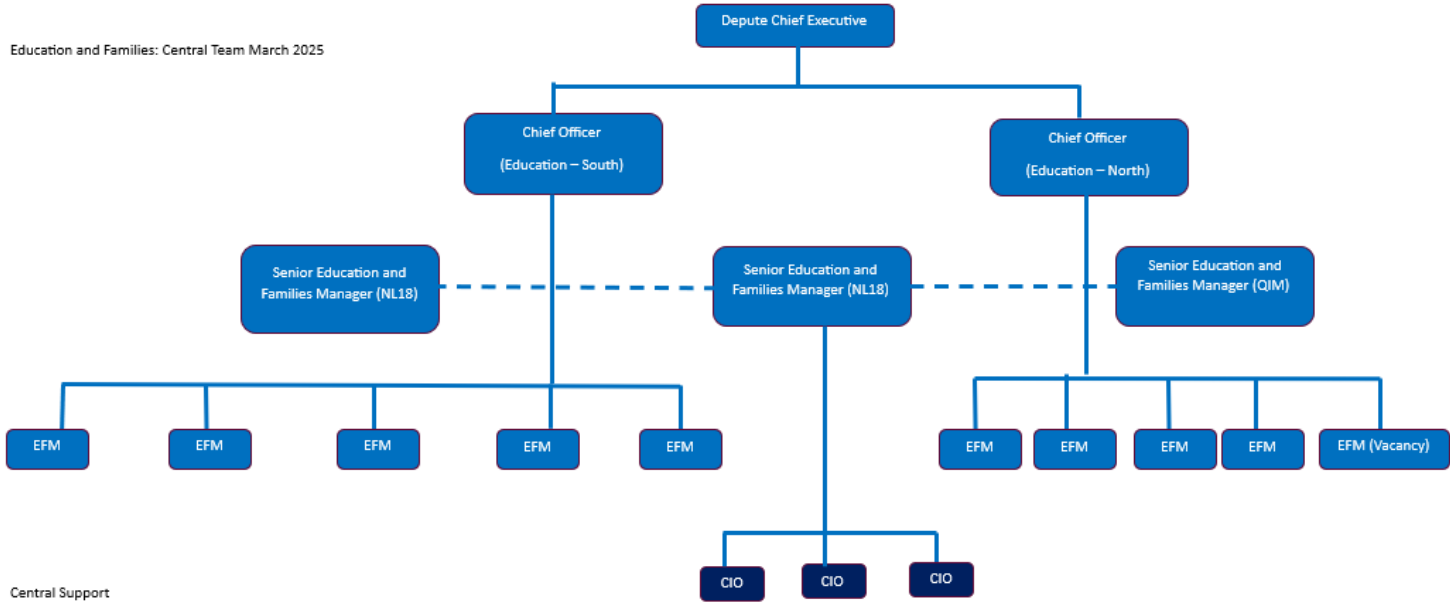
Appendix 1: Evolving Operating Model 2015- 2025

Central Support Structure 2015

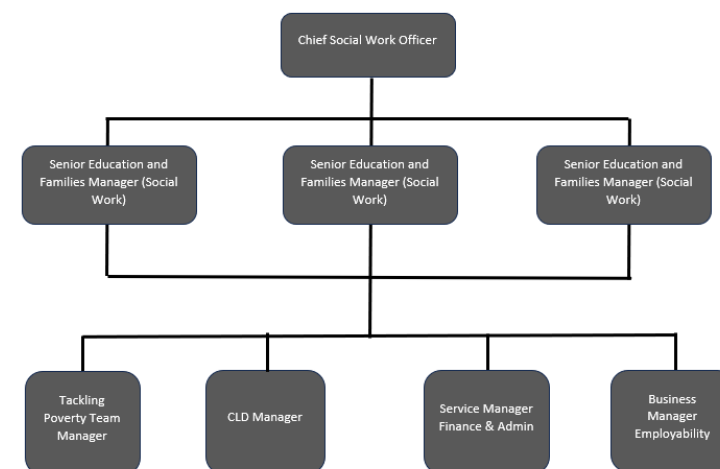


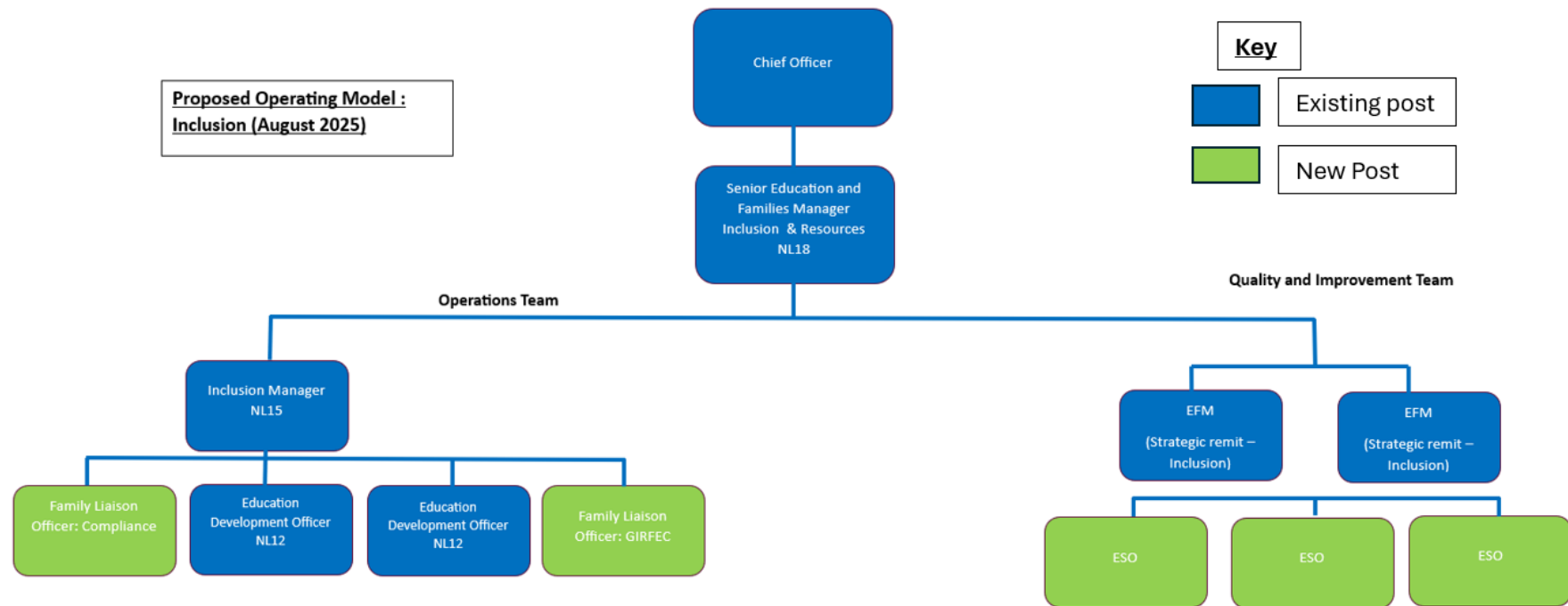
Operating Model : March 2025

Education and Families: Central Team March 2025

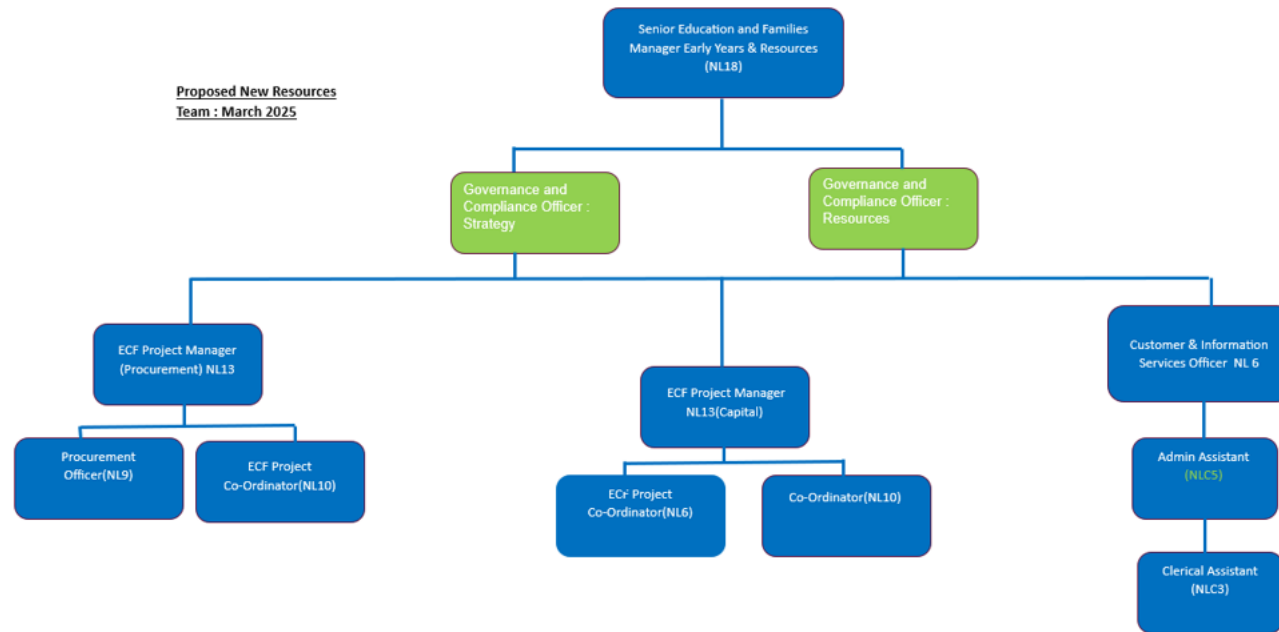


Central Team Leadership Model





Proposed New Resources
Team : March 2025



Appendix 3: Summary of Establishment Changes

Structure / Designation	Grade	Current FTE	Proposed FTE	FTE Change	Financial Impact	Actions
Management Structure						
Chief Officers (Education)	HOS2	2.00	2.00	NIL	£NIL	No change
Senior Education & Families Manager (SEFM)	NLC18	3.00	2.00	(1.00)	(£0.110m)	Delete 1.00 FTE
Senior Education & Improvement Manager (SIEM)	DHT13	-	2.00	2.00	£0.258m	Create 2.00 FTE
Education & Families Managers (EFM)	QIM	9.00	14.00	5.00	£0.597m	Create 5.00 FTE
Continuous Improvement Officer (CIO)	QIO	3.00	-	(3.00)	(£0.343m)	Delete / Reconfigure 3.00 FTE
Sub-Total: Management Structure		17.00	20.00	3.00	£0.402m	
Inclusion Team						
Family Liaison Officer (Compliance)	NLC12	-	1.00	1.00	£0.068m	Create 1.00 FTE
Family Liaison Officer (GIRFEC)	NLC12	-	1.00	1.00	£0.068m	Create 1.00 FTE
Education Support Officers (ESO)	ESO	-	3.00	3.00	£0.261m	Create 3.00 FTE
Sub-Total: Inclusion Team		0.00	5.00	5.00	£0.397m	
Resources Team						
Governance and Compliance Officer (Resources)	NLC14	-	1.00	1.00	£0.078m	Create 1.00 FTE
Governance and Compliance Officer (Strategy)	NLC14	-	1.00	1.00	£0.078m	Create 1.00 FTE
Sub-Total: Resources		0.00	2.00	2.00	£0.156m	
Total Proposal Impact Increase / (Decrease)		17.00	27.00	10.00	£0.955m	

The financial impact of the proposed structure is reflective of prevailing grading structures and legislative rates. In addition, for the posts that are to be created, the indicative impact of the job evaluation process would also need to be considered.

North Lanarkshire Council Report

Education, Children and Families Committee

Does this report require to be approved? ☒ Yes ☐ No

Ref BS/MD

Date 20/05/25

Proposed relocation of Glenboig Primary School to a new site

From Barry Smedley, Chief Officer (Education - North)

E-mail Smedleybar@northlan.gov.uk **Telephone**

Executive Summary

This report updates elected members on the outcome of the statutory consultation process, agreed on 21 May 2024, with regard to the proposed relocation of Glenboig Primary School to a new site. In particular the report provides:

- 1) Formal feedback from Education Scotland addressing the educational aspects of the proposal and the service response to the key points raised by Education Scotland as part of the Final Outcome Report (FOR).
- 2) Next steps for this proposal, should final approval to proceed be granted by Committee.

Recommendations

It is recommended that the Committee:-

- 1) Reflect upon the formal feedback report from Education Scotland;
- 2) Review the Statutory Consultation Outcome Report; and
- 3) Approve the new Glenboig Primary School
- 4) Note: Committee Paper amendments as per recommendations from Education Scotland in section 6 Final Outcome Report

The Plan for North Lanarkshire

Priority	Support all children and young people to realise their full potential
Ambition statement	(22) Facilitate a North Lanarkshire wide approach to asset rationalisation, including with communities and partners
Programme of Work	Transforming Places

1. Background

- 1.1 The key reason for this proposal is:
- 1.2 The growing and increased population within the Glenboig catchment area, primarily due to the Community Growth Area which is a strategic development for housing within this part of North Lanarkshire. There is insufficient capacity at the existing joint campus to provide adequate provision for the projected number of pupils at both existing schools.
- 1.3 It is proposed that the school will be sited on an area of land to the Southwest of the existing school and to the East of Glenboig Road (Appendix 2).
- 1.4 The pupils currently at Glenboig Primary School will benefit educationally by attending a new build school which can offer a wider range of educational opportunities and of adequate size to support learning and teaching.
 - 1.4.1 It has been evident for many years that a new build primary school is required to mitigate the impact of new housing on the school estate. The issue to date has been the lack of available land on which to build a new Community Hub. Due to the constraints of the existing site, it would not be possible to create a school of sufficient size to serve the needs of the growing school population. Unfortunately, the council did not own sufficient land in this area, and it has taken years of complex negotiations with landowners to acquire a site suitable to build a new Community Hub. The proposed new location has been determined as the council now owns this land.
- 1.5 Strategic fit with the priorities of the Plan for North Lanarkshire;
 - 1.5.1 Whilst this project predates the creation of the Town and Community Hub programme, all projects not yet designed will follow the six guiding principles attached to the Town and Community Hub programme. As such, in addition to the requested Statutory Education Consultation, there will be effective engagement with both the school and the wider community throughout the design stage of this project – should it be approved to proceed following Statutory Consultation. It is proposed that the intelligent brief process, which facilitates engagement with the stakeholders, would not wait until the education consultation is concluded but will be ‘delivered at risk’. It is not the case that the outcome is predetermined – hence the ‘at risk’ proposal. The council is looking to deliver a new facility as soon as practically possible, due to pressures at the existing establishment. However, it should be noted that should the outcome of the statutory education consultation conclude that the proposal should not be progressed, the work on the intelligent brief would cease.
 - 1.5.2 It has been evident for many years that a new build primary school is required to mitigate the impact of new housing on the school estate. The issue to date has been the lack of available land on which to build a new Community Hub. Due to the constraints of the existing site, it would not be possible to create a school of sufficient size to serve the needs of the growing school population.
 - 1.5.3 In line with the policy established in the Plan for North Lanarkshire to ensure that young people are catered for within high-quality facilities, it is also proposed that consultation takes place to strengthen the provision experienced by pupils in Glenboig Primary School.

2. Report

Consultation Process

- 2.1.1 The statutory consultation for Glenboig Primary School opened on 4 November 2024 and closed on 16 December 2024. A formal public consultation was held on Thursday 28 November 2024, where all affected stakeholders were invited (staff, parents and pupils).

These meetings were publicised extensively through various media platforms including the NLC webpage and SMS messages. Messages sent included a link directly to NLC consultation webpage to encourage all stakeholders to participate in the process.

2.1.2 Key themes across the consultations are noted below:

- Impact on the environment
- Safe walking routes
- Transport and accessibility to new site

Educational Benefits

2.2.1 In the report presented to the Education, Children and Families Committee on 21 May 2024, the Service reported on a number of anticipated and clear educational benefits to the proposals. In respect of the new Glenboig Primary School, the Service believes the benefits to be as follows:

- It will provide better learning opportunities for the children of Our Lady & St Joseph's Primary School and Glenboig Primary School.
- Currently, the use of shared spaces within the joint campus is under pressure with the numbers of children attending. The roll in both schools is likely to grow over time making the situation more difficult.
- Primary School will be able to use spaces more flexibly. Presently, staff find it difficult to find areas to work quietly with small groups or individual children. In this, as well as other regards, the proposal will bring benefits to all children including those with additional barriers to learning.
- The new school will be built to facilitate greater opportunities for active and outdoor learning whilst also making best use of the latest technology to enhance digital learning.

2.2.2 Experience in new school buildings has demonstrated that a new and flexible learning environment inspires staff and pupils and has a positive impact on general health and wellbeing.

2.2.3 There will be the opportunity to provide similar high-quality facilities for learning to be designated in such a way as to allow a range of teaching styles and approaches, including active learning, interdisciplinary learning and outdoor learning.

2.2.4 The new school will be designed in such a way as to promote accessible, inclusive learning which will meet the needs of all learners including those with Additional Support Needs.

2.2.5 Children and young people will be provided with a broad range of opportunities for personal achievement and interdisciplinary learning across all curricular areas by building on best practice in curriculum design in North Lanarkshire Schools.

2.2.6 The provision of high-quality technology for learning will provide the potential to transform ways of learning and teaching by giving young people and staff flexible and embedded access to a fully digital learning environment.

2.2.7 The new school will be fully accessible to disabled learners as required by the Equality Act (2010). This will be ensured through the delivery of the Council's:

- Equality outcomes
- Promoting Inclusive Design Protocol and
- Partnership with North Lanarkshire Disability Access Panel.

- 2.2.8 The new school will be designed in such a way as to promote accessible, inclusive learning which will meet the needs of all learners including those with Additional Support Needs.
- 2.2.9 The new school will build on current, and facilitate new, opportunities for effective integrated working with other services and partner agencies and will provide necessary support to children and families in the new school catchment area.
- 2.2.10 The new school's design, construction and operation will be environmentally and energy efficient; contributing directly to delivering the year-on-year reductions in greenhouse gas emissions introduced by the Climate Change (Scotland) Act 2009 and provide a rich context for learning for children and young people about sustainability now and in the future.

Community Benefits

- 2.3.1 The current council education estate framework has delivered added value through:
- Several apprenticeships have previously been created on the construction of new schools.
 - Local employment opportunities
 - Meaningful learning and engagement between the framework partners and the project schools
 - Over 70% of the total investment is being procured through local supply chains.
- 2.3.2 In order to maximise the level of local community benefits, regular meetings take place with framework contractors and the council's Estate Teams. As we move forward at the pre-qualification stage, contractors appointed to the framework and their supply chains will be required to; actively participate in the achievement of social, environmental and sustainability policy objectives relating to local regeneration, social and economic growth, recruitment and training along with local supply chain initiatives. In addition, sustainability will be a key objective on the construction of the new schools thereby contributing to the Councils target of reducing our carbon footprint.
- 2.3.3 As well as the educational benefits allocated to the specific school projects, there will be wider educational benefits to the North Lanarkshire Community in that, with the significant level of savings required to be made over the next few financial years, the best value argument is that we would be utilising resources more efficiently and effectively. This is in line with 2003 Best Value Legislation and also the demands of the Education Scotland Act 1980.

Summary of response from Education Scotland

- 2.4.1 In reporting on their evaluation of the proposals in February 2025, HM Inspectors agree, overall, that the proposal to build a new Glenboig Primary School has clear potential education benefits.
- 2.4.2 The key potential educational benefits are:
- Improved access to high quality, flexible learning spaces that will have a positive impact on the general health and wellbeing of children and staff.
 - A greater range of educational experiences, including outdoor learning, which is limited in and around the current building
 - Increased opportunities for learners to achieve across all areas of Curriculum for Excellence
- 2.4.3 HM Inspectors also state that the stakeholders they met with are positive about the move to a new school.

Education Scotland Recommendations

- 2.5.1 North Lanarkshire Council should continue to work with parents, staff and local residents to ensure that they are kept informed of and engaged in progress.
- 2.5.2 In its consultation report, the council will need to set out the actions it has taken to address any alleged inaccuracies and omissions notified to it.

Next Steps

- 2.6.1 If approved by Committee, the following issues will be progressed as a matter of priority:
- 2.6.2 Communication
- A stakeholder communication plan will be developed, in order to:
 - Ensure that learning and wider communities know and contribute to the benefits of this proposal as it is implemented.
 - Provide feedback to officers and engage in meaningful dialogue to encourage participation of staff, parents/carers and pupils in transition arrangements (including risk assessment procedures).
- 2.6.2 Transitions and young people's safety
- The Service will participate in meaningful dialogue to inform staff, parents/carers and pupils regarding location of the new school and safe walking routes.

Programme of Work

- 2.7.1 The Programme of Work that will facilitate these new arrangements was approved by the Strategic Capital Development Group on 20 May 2021 as part of the Community Investment Fund. If approved, the timeline for the Programme of Work will be developed through the Strategic Capital Development Group.

3. Measures of success

- 3.1 Successful implementation of planned proposals.
- 3.2 Improved quality of service and provision to effectively meet the needs of children, young people and families.
- 3.3 Increased number of children and young people remaining within their local community.
- 3.4 Improved life-chances of children and young people.
- 3.5 Successful transition arrangements planned and enacted.

4. Supporting documentation

- 4.1 Appendix 1 – Final Outcome Report
Appendix 2 - Red Line Boundary
Appendix 3 - Indicative Timeline for Consultation

B Smedley

5. Impacts

5.1 Public Sector Equality Duty and Fairer Scotland Duty

Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact?

An equality impact assessment has been completed and will underpin planning for these proposals. The LCSC will accommodate young people who are a protected group due to disability.

If Yes, has an assessment been carried out and published on the council's website?

Yes ☒ No ☐

5.2 Financial impact

Does the report contain any financial impacts?

Yes ☒ No ☐

If Yes, have all relevant financial impacts been discussed and agreed with Finance?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact?

Glenboig Community Hub has been allocated funding from the current five-year capital programme as part of the funding allocated to the Town and Community Hub programme of work". As such, the relevant financial approvals are in place to take this project forward, subject to statutory education approval

5.3 HR policy impact

Does the report contain any HR policy or procedure impacts?

Yes ☒ No ☐

If Yes, have all relevant HR impacts been discussed and agreed with People Resources?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact?

Affected staff will be managed in accordance with the appropriate Workforce Change Policies and in with the signatory Trade Unions. Considerations would include compulsory transfer, premature/early retirement. Redundancy and redeployment.

The Service would be required to follow the requirements for consulting as set out in the Schools (Consultation)(Scotland) Act 2010. Further stakeholders, community and parental consultation would be required in the vent that the service proceeds with any of the recommendations.

5.4 Legal impact

Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)?

Yes ☒ No ☐

If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact?

All statutory duties will be complied with and advice sought, where appropriate, from Legal Services

5.5	Data protection impact Does the report / project / practice contain or involve the processing of personal data? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, is the processing of this personal data likely to result in a high risk to the data subject? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
5.6	Technology / Digital impact Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact? Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
5.7	Environmental / Carbon impact Does the report / project / practice contain information that has an impact on any environmental or carbon matters? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact? The carbon footprint will reduce if the numbers of establishments operating was reduced and pupils were catered for in our newer and more energy efficient campuses.
5.8	Communications impact Does the report contain any information that has an impact on the council's communications activities? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact? Communications will be managed by the Service.
5.9	Risk impact Is there a risk impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed? All capital works are managed through the council's capital governance model. Reporting into SCDG and Committee where required.
5.10	Armed Forces Covenant Duty Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the Armed Forces community to make Page 57 of 268

5.11 Children's rights and wellbeing impact

Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC).

The right to an education is embedded in statute and the council applies these rights without discrimination (Article 2) • the best interests of the child is a primary consideration (Article 3) • the child's wellbeing under GIRFEC is a consistent framework and shared language that promotes supports and safeguards the wellbeing of our children and young people (Article 6) • the council's priorities have been shaped by listening to children and young people and their families and pupil views were gathered and taken into account as part of the statutory consultation (Article 12)

If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?

Yes ☒ No ☐

Appendix 1 – Final Outcome Report

North Lanarkshire Council

Statutory Consultation – Final Outcome Report

Proposal to build a new Glenboig Primary School

EDUCATION, CHILDREN AND FAMILIES

Published March 2025

This report has been prepared having regard (in particular) to:

- (a) relevant written representation received by the council (from any persons) during the consultation period;
- (b) oral representations made to the council (by any person) at an online public meeting; and
- (c) Report by Education Scotland prepared by His Majesty's Inspectors of Education

This report is available for inspection at:

- (a) www.northlanarkshire.gov.uk/consultation
- (b) Education and Families Headquarters, Civic Centre, Motherwell, ML1 1AB
- (c) Glenboig Primary School

This document has been issued by North Lanarkshire Council in accordance with the terms of the Schools (Consultation) (Scotland) Act 2010 and amendments contained in the Children and Young People (Scotland) Act 2014

1. BACKGROUND

- 1.1 Glenboig Primary School is a non-denominational primary school which is co-located with Our Lady and St Joseph's Primary School. The joint campus was built as part of the council's Public Private Partnership (PPP) initiative and opened in 2006. The school capacity of the school is 113 with the current roll of 120.
- 1.2 The key reasons for the proposal, as set out in the Committee paper, were;
- The pupils currently at Glenboig Primary School will benefit educationally by attending new build schools which can offer a wider range of educational in a facility with an adequate number of learning and teaching spaces to serve this pupil population.
 - The current joint campus which Glenboig Primary School shares with Our Lady and St Joseph's Primary School does not have sufficient capacity to serve the growing population in this area. The decoupling of Glenboig Primary School from the existing joint campus will provide new facilities for Glenboig Primary School and create additional capacity for Our Lady and St Josephs within the existing school grounds.
- 1.3 Appendix (i) of this report contains the consultation report as issued.

2. THE CONSULTATION PROCESS

2.1 Consultation Framework

- 2.1.1 The consultation process was carried out in accordance with the terms of the Schools (Consultation) (Scotland) Act 2010 and the amendments contained in the Children and Young People (Scotland) Act 2014. It is within this statutory framework that Education and Families, has engaged in a consultation exercise with all relevant consultees.

The consultation document developed for consideration included information on:-

- the proposal;
 - the consultation process;
 - the arrangements for public meetings;
 - relevant school data;
 - the educational benefits of the proposal;
 - community benefits statement;
 - equality impact assessment; and
 - consultation timeline.
- 2.1.2 Consultation packs were made available on-line and paper copies on request to all relevant consultees.
- 2.1.3 The Head Teacher of Glenboig Primary School and Our Lady and St Joseph Primary School was notified of the consultation.
- 2.1.4 The consultation period commenced on Monday 4 November 2024 and a total of 43 days, which included 30 school days. Consultation ended on Monday 16 December 2024.
- 2.1.5 Details of the consultation process were made available on a dedicated area of the North Lanarkshire Council website at www.northlanrkshire.gov.uk/consultation
- 2.1.6 A face-to-face staff meeting was held on Thursday 28 November from 3.30pm until 4.30pm at Glenboig Primary School.

- 2.1.7 A face-to-face public meeting was held on Thursday 28 November from 7.00pm until 9.00pm at Glenboig Primary School.
- 2.1.8 Responses to the proposal could be made electronically to efglenboigconsultation@northlan.gov.uk , or in writing posted to the council. Paper forms were also provided at the consultation meetings.

2.2 Relevant Consultees

Consultees were identified according to Schedule 2 of the Schools (Consultation)(Scotland)Act 2010. The relevant consultees included:-

- Parent Council of Glenboig Primary School
- Parents/Carers and pupils of Glenboig Primary School
- Staff of Glenboig Primary School
- Any body or organisation which has been established by North Lanarkshire Council, whether formally or informally, for the purpose of assisting it in carrying out its functions under Part 2 of the Local Government Act 2003;
- Education Scotland
- Elected members
- Trade Unions
- Community Councils

3. **RESPONSES TO THE CONSULTATION**

3.1 Overview of Level of Response to the Consultation

During the consultation period the numbers of consultee who engaged in the process were as follows:

- Staff meeting held on Thursday 28 November 2024 – 9 attendees.
- Public meeting held on Thursday 28 November 2024 – 12 attendees. There was representation from Education Scotland.
- The total number of individual consultee email responses received was – one.

The matters raised by stakeholders are summarised in Appendix (iii) of this report and form the basis for the areas listed below. Copies of the full consultation responses and notes from the on-line meetings can be found at www.northlanarkshire.gov.uk/consultation

3.2 Consultation and Channels and views expressed

Following the public meeting the council produced a Frequently Asked Questions (FAQs) document that was published on-line.

There was one email responses in total to the proposal.

The total number of individual consultee responses received was – one, which was supportive of the proposal.

Further analysis of opinion is included at Appendix (iii) through the FAQs.

4. **SUMMARY OF ISSUES RAISED BY STAKEHOLDERS AND EDUCATION & FAMILIES RESPONSE**

The issues raised by participants in the consultation have been grouped and considered by Education and Families, with input from other Council officers with appropriate specialisms, under the following headings with the response from the service added in each case:

- Local infrastructure
- Impact on the environment

- Acceptable walking routes and accessibility to new site

4.1 Local infrastructure

Stakeholders asked how many new houses will be built within the area.

Response

The plan is for over 1000 houses in the Glenboig area. The red line boundary has 210 houses allocated but will be reduced due to Hub being located in this area.

4.2 Impact on the environment

Stakeholders raised concerns about the removal of the surrounding forrest area which it utilised by children and young people.

Response

This will be part of the planning application and a full appraisal will be undertaken including a cost benefit analysis. Planning Department would make the decision if trees were to be replanted.

4.3 Safe walking routes and accessibility to site

Queries were raised around access to the hub and an increase to entrances and pedestrian crossings.

Response

This will be part of the planning application process and intelligent brief, however there will be upgrades to roads and paths to allow pedestrians and cyclists to travel.

5. SUMMARY OF EDUCATION SCOTLAND REPORT AND RESPONSE OFFERED BY THE SERVICE

The full report provided by Education Scotland is attached in Appendix (ii). Please see this report for full commentary. The main points are as follows:-

- HM Inspectors agree with the council's proposal to build a new primary school in Glenboig.
- The school roll is predicted to rise further in the coming years due to house building and the existing building may not meet the demand.
- HM Inspectors agreed with the educational benefits outlined in the proposal.
- HM Inspectors noted that all stakeholders are positive about the new school.
- They believe that the council should consider appropriate modifications that could be made to Our Lady & St Joseph's Primary School to improve the learning environment.
- Should the proposal go ahead, North Lanarkshire Council should continue to work with parents, staff and local residents to ensure that they are kept informed of and engaged in progress.

In response to the observations of Education Scotland, Education, Children & Families agree that these findings are consistent with those of the Service.

North Lanarkshire Council has a strong track record in engaging with all stakeholders in the aspects of school design, management, and operation. The Service will continue to engagement with all stakeholders both formally (statutory planning process) and informally (through the school's management and parent councils) with regard to the proposals as they proceed, should this proposal be implemented.

6. ALLEGED OMISSIONS OR INACCURACIES

The Service noted, prior to the public consultation opening, that the Committee Paper dated 21 May 2024 contained the following inaccuracies/erroneous statements. These were updated and/or reported to stakeholders through the council's consultation webpage and during the public consultation meetings held on Thursday 28 November 2024.

- A new redline boundary was provided to consider the best location of the establishment whilst preserving the remainder of the site for other use in the future.
- The removal of the Language and Communication Support Centre and Early Learning and Childcare provision.
- The removal of the erroneous bullet point in section 4.1 mentioning St Kevin's and Bargeddie.
- Email address was updated.
- The removal of the erroneous bullet point stating that the secondary education catchment is Chryston High School as Glenboig pupils will attend Coatbridge High School
- Link to share views on the proposal was not yet live and following Committee approval a live link was provided: efglenboigconsult@northlan.gov.uk
- Committee paper timeline was indicative, and an updated consultation timeline was provided prior to consultation opening.

All of the above inaccuracies/omissions were uploaded to the consultation web page prior to the consultation opening and addressed during the public consultations.

7. EQUALITY CONSIDERATIONS

Assessments have been carried out in accordance with the following statutory duties:

Public Sector Equality Duty

Fairer Scotland Duty

Armed Forces Covenant Duty

Children's Rights and Wellbeing Act

The assessments concluded that the main groups impacted are:

- Pupils of Glenboig Primary School
- Parents/carers of those pupils;
- Staff who work at Glenboig Primary School

The assessment summary is attached at Appendix (iv).

8. NEXT STEPS

Following the publication of this Report, time is allowed for further considerations. A three-week period will lapse before North Lanarkshire Council takes a final decision on whether to implement a final proposal.

The report on this consultation is due to be considered by North Lanarkshire Council's, Education, Children & Families Committee on 20 May 2025.

If approved, an implementation group consisting of members of the senior management from Glenboig Primary School, along with parent council and pupils, will be established to ensure continued engagement of all stakeholders throughout the reloc

Statutory Consultation

Proposal to build a new Glenboig Primary School

EDUCATION AND FAMILIES



Proposal to build a new Glenboig Primary School

1. INTRODUCTION

Glenboig Primary School is a non-denominational primary school which is co-located with Our Lady and St Joseph's Primary School. The joint campus was built as part of the council's Public Private Partnership (PPP) initiative and opened in 2006.

The school capacity of the school is 113 with the current roll of 120.

2. CONSULTATION REQUIREMENTS

2.1 In terms of the Schools (Consultation) (Scotland) Act 2010, the Education Authority is required to publish details of and consult on any proposal to establish a new school and on any proposal to establish, terminate or otherwise alter the catchment area of a school.

2.2 North Lanarkshire Council will not make any decision, or put any changes into effect, until the consultation period has been concluded in line with statutory requirements.

2.3 The consultation period begins on 4 November 2024 and finishes on 16 December 2024, which include 30 school days.

2.4 The consultation will involve pupils, parent/carers, Parent Councils and staff of the schools involved, as well as other associated stakeholder and statutory consultees.

2.5 A public meeting will be held on week beginning 25 November 2024.

2.6 Council officers will be present at the public meeting to discuss the proposal. There will be limited time at the meeting to discuss all issues fully. To ensure that all issues are covered and that those who may be uncomfortable with speaking publicly are heard, advance notice of specific questions or issues to be raised will be accepted in writing up to two days in advance of the meeting – see contact details at 2.9.

2.7 At the end of the consultation process, a report will be prepared for North Lanarkshire Council detailing all responses received, summaries of their content and a statement from Education Scotland on the educational aspects of the proposal. Responses to the issues raised through the consultation will also be incorporated in the report. Copies of the report will be available, prior to consideration by the council, in the affected schools and online. It is envisaged that the report will be published on March 2025.

2.8 An online version of the document and other items related to the consultation can be found online at www.northlanarkshire.gov.uk/Glenboig-consultation

2.9 Further information on the proposal can be obtained by sending an email to Glenboigconsultation@northlan.gov.uk

2.10 All interested parties are invited to submit their comments on or before 16 December 2024.

3. PROPOSAL

3.1 The proposal in this document is to build a new facility incorporating a new build

Glenboig Primary School. There are two main reasons for this proposal:

- The pupils currently at Glenboig Primary School will benefit educationally by attending new build schools which can offer a wider range of educational opportunities (see Educational and Community Benefits sections below) in a facility with an adequate number of learning and teaching spaces to serve this pupil population.
- The current joint campus which Glenboig Primary School shares with Our Lady and St Joseph's Primary School does not have sufficient capacity to serve the growing population in this area. The decoupling of Glenboig Primary School from the existing joint campus will provide new facilities for Glenboig Primary School and create additional capacity for Our Lady and St Josephs within the existing school grounds.

3.2 It is proposed that the school will be sited on an area of land to the Southwest of the existing school and to the East of Glenboig Road.

3.3 If, following this statutory consultation, the Council proceeds with the proposed school, Glenboig Primary School will remain within the existing joint campus until the new school is deemed operational.

4. EDUCATION BENEFITS STATEMENT

4.1 Through the planned proposals it is expected that several education benefits will be achieved on behalf of children and young people including:

- It will provide better learning opportunities for the children of Our Lady & St Joseph's Primary School and Glenboig Primary School.
- Currently, the use of shared spaces within the joint campus is under pressure with the numbers of children attending. The roll in both schools is likely to grow over time making the situation more difficult.
- Primary School to use space more flexibly. Presently, staff find it difficult to find areas to work quietly with small groups or individual children. In this, as well as other regards, the proposal will bring benefits to all children including those with additional barriers to learning.
- The new school will be built to facilitate greater opportunities for active and outdoor learning whilst also making best use of the latest technology to enhance digital learning.

4.2 Experience in new school buildings has demonstrated that a new and flexible learning environment inspires staff and pupils and has a positive impact on the general health and wellbeing of stakeholders.

4.3 There will be the opportunity to provide similar high-quality facilities for learning to be designated in such a way as to allow a range of teaching styles and approaches, including active learning, interdisciplinary learning and outdoor learning.

4.4 The new school will be fully accessible to disabled learners as required by the Equality Act (2010). This will be ensured through the delivery of the Council's:-

- Equality outcomes

- Promoting Inclusive Design Protocol and
 - Partnership with North Lanarkshire Disability Access Panel.
- 4.5 The new school will be designed in such a way as to promote accessible, inclusive learning which will meet the needs of all learners including those with Additional Support Needs.
- 4.6 The new school will build on current, and facilitate new, opportunities for effective integrated working with other services and partner agencies and will provide necessary support to children and families in the new school catchment area.
- 4.7 The new school's design, construction and operation will be environmentally and energy efficient; contributing directly to delivering the year-on-year reductions in greenhouse gas emissions introduced by the Climate Change (Scotland) Act 2009 and provide a rich context for learning for children and young people about sustainability now and in the future.

5. COMMUNITY BENEFITS STATEMENT

- 5.1 The current council education estate framework has delivered added value through:
- Several apprenticeships have been created on the construction of the new schools.
 - Local employment opportunities.
 - Meaningful learning and engagement between the framework partners and the project schools.
 - Over 70% of the total investment is being procured through local supply chains.
- 5.2 In order to maximise the level of local community benefit regular meetings take place with framework contractors and the council's Estate Teams. As we move forward at the pre-qualification stage contractors appointed to the framework and their supply chains will be required to actively participate in the achievement of social, environmental and sustainability policy objectives relating to local regeneration, social and economic growth, recruitment and training along with local supply chain initiatives. In addition, sustainability will be a key objective on the construction of the new schools thereby contributing to the Council's target of reducing our carbon footprint.
- 5.3 As well as the educational benefits allocated to the specific school projects there will be wider educational benefits to the North Lanarkshire Community in that, with the significant level of savings required to be made over the next few financial years, the best value argument is that we would be utilising resources more efficiently and effectively. This is in line with 2003 Best Value Legislation and the demands of the Education Scotland Act 1980.

6. IMPLICATIONS OF THE PROPOSALS

6.1 Rolls and Capacities

The projected rolls exclude placing requests but include house building estimates.

Table 3: Projected rolls and capacities for Glenboig Primary School 2024 - 2026

School	Capacity	Roll 2024		Roll 2025		Roll 2026	
		Roll	%	Roll	%	Roll	%
Permanent	113	120	106	131	116	150	133

The projected rolls exclude placing requests but include house building estimates. The roll is expected to increase further in future years as the house building in this area continues.

6.2 Transport to School

Council Policy currently provides free transport to those pupils living more than one mile from their zoned Primary School or where an appropriate walking route is not available. Education & Families will arrange for an assessment of the walking routes to the site of a new school and appropriate road crossing patrols will be established if considered necessary.

6.3 Staffing

The proposal should not have significant implications for staffing, either teaching or non-teaching. Any matter which arises will be dealt with within the terms of local and national agreements.

6.4 Secondary Education

The current zoning arrangement for secondary education is that pupils attending Glenboig Primary School attend Coatbridge High School. No change to the primary to secondary transfer arrangements will be required as a result of this proposal. Parents who wish their children to attend an alternative secondary school will require to submit a placing request for their preferred school.

6.5 Class Sizes

Class structures are decided by the head teacher in accordance with authority guidelines and take account of a range of factors, including teacher deployment, school policies, the available accommodation and pupil numbers at each stage.

6.6 Future use of the existing school buildings

The existing spaces within the existing joint campus will be handed over to the existing Our Lady and St Joseph's Primary School. Effectively, the existing joint campus will become a site serving a single school – Our Lady and St Joseph's, with the signage etc. being updated once Glenboig Primary School relocate to the new location.

6.7 Financial implications

Based on previous experience of new build projects within North Lanarkshire, it is anticipated this proposal will have a limited impact on school revenue budgets.

6.8 Placing Requests

It is anticipated that there will be no impact on pupils attending either school on a placing request. The following options exist for pupils in this position. Firstly, they can transfer

to the new school. Secondly, they can enrol in their designated catchment area school or thirdly, submit a placing request to another School. The parents of these pupils will be given the opportunity to discuss their preference with Education & Families staff. Parents remain responsible for transport costs where an existing placing request to the new build school is continued.

7. EQUALITY IMPACT ASSESSMENT

- 7.1 An Equality Impact Assessment has been completed and will underpin planning for these proposals, since a number of the young people involved are considered as being from a protected group, due to disability.

8. INACCURACIES OR OMISSIONS

- 8.1 There is a statutory requirement for the Council to consider any allegation of an inaccuracy or omission in the proposal paper and determine whether the allegation has foundation. Where inaccuracies or omissions are notified to, or discovered by, the Council within this proposal document, the Council will determine if relevant information has, in its opinion been omitted or whether there is in fact an inaccuracy.

Notifiers of any omissions or inaccuracies will be informed of the Council's decision and the reasons for that decision. Notifiers will also be informed of any action. The Council will invite the notifiers to make further representations to the Council should they disagree with the Council's determination or its decision as to whether to take action.

- 8.2 If the Council has found, either itself or through a concern being raised, that there is an inaccuracy or omission in the proposal paper, it must decide whether this relates to a material consideration relevant to the proposal.

Where the confirmed inaccuracy or omission relates to a material consideration, there is a duty on the Council to correct it.

- 8.3 Appropriate action will then be taken by the Council depending on whether the inaccuracy or omission relates to a material consideration.

Such action may include withdrawing the proposal and issuing a revised proposal paper for the whole consultation period, or issuing a corrected proposal paper with, if, an extension of the consultation period. In any of these eventualities, all relevant consultees (and, where applicable, the notifier(s) of any omissions or inaccuracies) and HMIE (Education Scotland) will be advised of the action.

Where inaccuracies or omissions are discovered within the proposal document, the Council will determine whether relevant information has been omitted or if there has been an inaccuracy. action will then be taken by the Council, which may include issuing corrections, issuing a corrected proposal document, or an extension of the consultation period. In any of these eventualities, all relevant consultees (and where applicable, the notifiers(s) of any action) will be advised.

- 8.4 Notifiers of any omissions or inaccuracies will also be given the opportunity to make representations if they disagree with the Council's determination of any action on the matter, which may result in the Council making a further determination/decision on the matter.

9. THE STATUTORY CONSULTATION PROCESS – ADDITIONAL INFORMATION

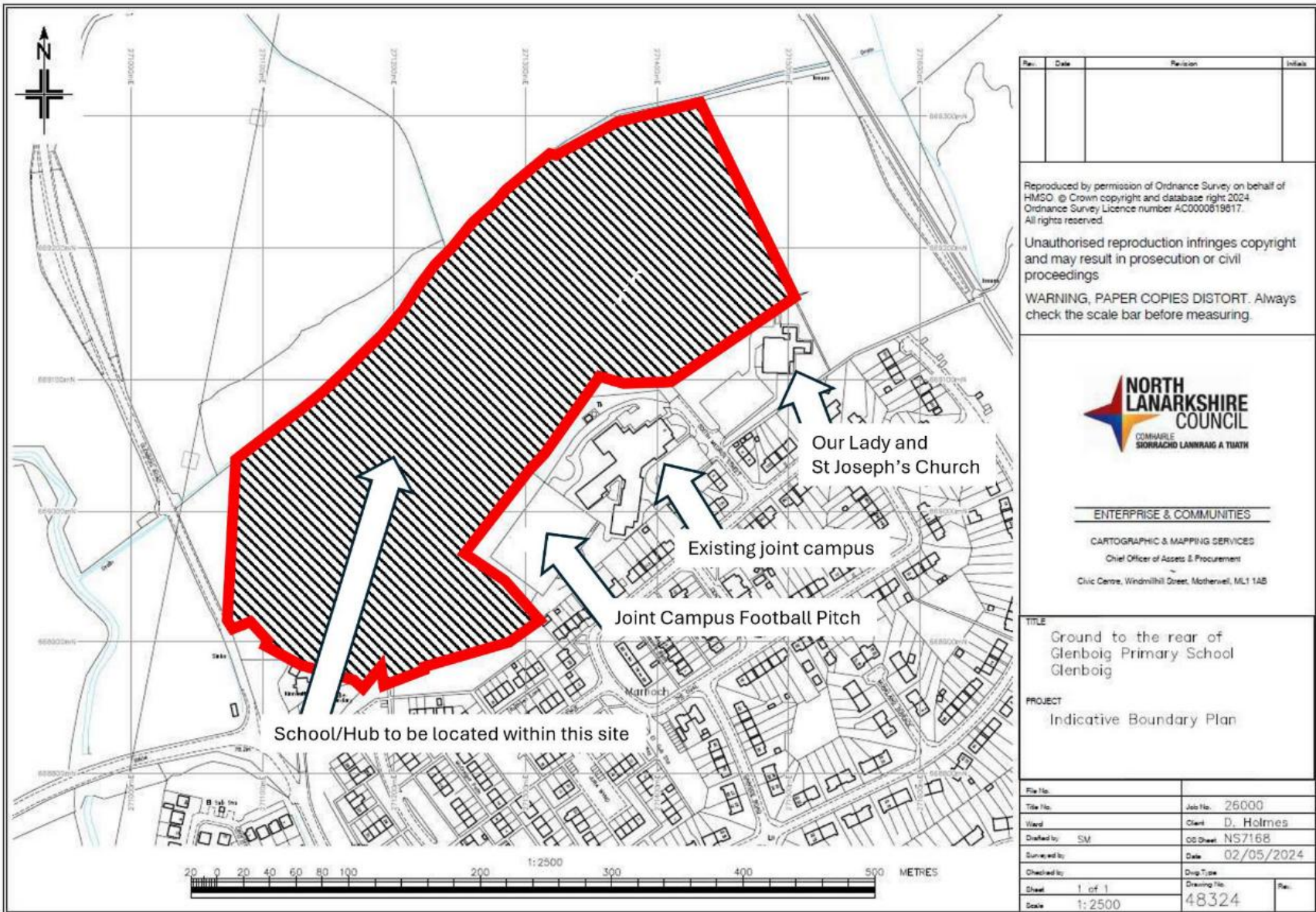
- 9.1 The current requirements for consulting are set out in the Schools (Consultation) (Scotland) Act 2010. This consultation will be carried out in accordance with the Act.

- 9.2 This consultation has been planned in order to meet the statutory requirements.
- 9.3 The consultation document sets out the details of the proposal.
- The proposal paper details the educational benefits of the proposal and other relevant information.
 - The proposal paper will be published and widely advertised.
 - North Lanarkshire Council will seek to determine whether there are inaccuracies or omissions within the proposal paper and take such action as it considers necessary.
 - The consultation period will be a period of at least 6 weeks including at least 30 school days.
- 9.4 Prior to the commencement of the consultation period, the authority will give notice of the proposal to the relevant consultees. The relevant consultees are defined in the Schools (Consultation) (Scotland) Act 2010, and are as follows:
- (a) The parent council or combined parent council of any affected school
 - (b) The parents of the pupils at any affected school
 - (c) The parents of any children expected by the education authority to attend the affected school within two years of the date of publication of the proposed paper
 - (d) The pupils at any affected school (in so far as the education authority considers them to be of suitable age and maturity)
 - (e) The staff (teaching and other) at any of the affected school(s)
 - (f) Any trade union which appears to the education authority to be representative of the persons mentioned above
 - (g) The community council (if any)
 - (h) The community planning partnership (within the meaning of section 4(5) of the Community Empowerments (Scotland) Act 2015 for the area of the local authority in which any affected school is situated
 - (i) Any other community planning partnership that the education authority considers relevant
 - (j) Any other education authority that the education authority considers relevant
 - (k) Any other users of any affected school that the education authority considers relevant.
- 9.4 During the consultation period, the authority will hold and be represented at public meetings on the relevant proposal.
- 9.5 The council will involve Education Scotland in the consultation process. This will culminate in Education Scotland preparing and submitting an independent report on the educational aspects of the proposal.
- 9.6 Following the consultation period, the council will prepare and publish a consultation report. The report will be published at least three weeks before a final decision is taken on the proposal.
- 9.7 The consultation timeline provides further information on the timescales for various staged in the statutory process.

Please click on the link below to share your views on the proposal (Ctrl + Click to follow link)

www.northlanarkshire.gov.uk/Glenboig-consultation

Appendix 2 – Red Line Boundary



Appendix 3 - Indicative Timeline for Consultation

Stages	Timeline (30 calendar days of consultation excludes weekends/ school holidays/term days, etc.)	Date
1. Committee Date		10 September 2024
2. Consultation Starts Phase 1	Minimum of 6 weeks To include 30 calendar days	11 September 2024
3. Public Meeting	Mid-way through consultation period	w/b 30 September 2024
4. Consultation Ends	30 Days (37 days in total to account for 27/9/2024 and 30/9/2024 and 14/10/2024 to 18/10/2024)	29 October 2024
5. Report to Education Scotland (ES) Phase2	Minimum 3 weeks	26 November 2024
6. Education Scotland produce report	Minimum 3 weeks (to be agreed with ES)	TBC
7. Consultation report published Phase 3	No specified timescale	TBC
8. Time for further consideration	3 weeks from publication date	TBC
9. Final Committee Decision		20 May 2025
10. Implement proposal if approved by Committee	3 weeks	TBC

Appendix 3

Glenboig Primary School - Timeline for Consultation

Stages	Timeline	Date
1. Committee Date		21 May 2024
2. Consultation Starts Phase 1	Minimum of 6 weeks To include 30 calendar days	4 November 2024
3. Public Meeting	Mid way through consultation	28 November 2024
4. Consultation Ends	30 Days	16 December 2024
5. Report to Education Scotland Phase2	3 weeks	3 February 2025
6. Education Scotland produce report	3 weeks	3 March 2025
7. Consultation report published Phase 3	No specified timescale	17 March 2025
8. Time for further consideration	3 weeks from publication date	
9. Final Committee Decision		20 May 2025
10. Implement proposal if approved by Committee		TBC



Schools (Consultation) (Scotland) Act 2010

**Report by Education Scotland addressing educational aspects of
the proposal by North Lanarkshire Council to relocate and build a
new Glenboig Primary School.**

February 2025

1. Introduction

- This report from Education Scotland has been prepared by His Majesty's Inspectors of Education (HM Inspectors) in accordance with the terms of the [Schools \(Consultation\) \(Scotland\) Act 2010](#) ("the 2010 Act"). The purpose of the report is to provide an independent and impartial consideration of a proposal by North Lanarkshire Council to relocate and build a new Glenboig Primary School. Section 2 of the report sets out brief details of the consultation process. Section 3 of the report sets out HM Inspectors' consideration of the educational aspects of the proposal, including significant views expressed by consultees. Section 4 summarises HM Inspectors' view. Upon receipt of this report, the Act requires the council to consider it alongside any relevant considerations the council received and then prepare its consultation report. The council's consultation report should include this report and must contain an explanation of how, in finalising the proposal, it has reviewed the initial proposal, including a summary of points raised during the consultation process and the council's response to them. The council has to publish its consultation report at least three weeks before it takes its final decision. With all proposals the council needs to follow all statutory obligations set out in the 2010 Act.

1.2 HM Inspectors considered:

- the likely effects of the proposal for children of the schools; any other users; children likely to become pupils within two years of the date of publication of the proposal paper; and other children in the council area;
- any other likely effects of the proposal;
- how the council intends to minimise or avoid any adverse effects that may arise from the proposal; and
- the educational benefits the council believes will result from implementation of the proposal, and the council's reasons for coming to these beliefs.

1.3 In preparing this report, HM Inspectors undertook the following activities:

- attendance at the public meeting held on 28 November 2024 in connection with the council's proposals;
- consideration of all relevant documentation provided by the council in relation to the proposal, specifically the educational benefits statement and related consultation documents, written and oral submissions from parents and others; and
- visits to the shared campus of Glenboig Primary School and Our Lady and St Joseph's Primary School, including discussion with relevant consultees.

2. Consultation process

- North Lanarkshire Council undertook the consultation on its proposal(s) with reference to the [Schools \(Consultation\) \(Scotland\) Act 2010](#).
- The statutory consultation ran from 4 November until 16 December 2024. The council published the proposal on its website and made copies available to a range of key stakeholders. The council held a public meeting in Glenboig Primary School on 28 November 2024, which was attended by 12 members of the public. The council received one written response, which was supportive of the proposal. Stakeholders expressed concerns about the lack of local infrastructure to accommodate transport and accessibility to the proposed new school site. They are worried about the potential loss of the forest

area and negative impact this may have on the environment.

Educational aspects of proposal

- North Lanarkshire Council proposes to relocate Glenboig Primary School into a new build Glenboig Community Hub, which will accommodate primary school places for up to 292 children. The current joint campus, which is shared with Our Lady and St Joseph's Primary School, does not have the capacity to serve the growing population in the local area. The new building will enable the school to accommodate more children to address the increasing school roll resulting from current and planned housing developments. The council has outlined a number of educational benefits, which should be realised if the proposal proceeds. The proposed new facility should provide increased flexibility and promote accessible, inclusive learning that will meet the needs of all learners. The council states that the new school will make best use of technology to enhance digital learning and provide greater opportunities for active and outdoor learning. The new build facility should enable further integrated working with other services and partner agencies and provide additional support to children and families. HM Inspectors agree with the educational benefits outlined in the proposal.

2.2 All stakeholders are positive about the new school. Children from Glenboig Primary School, who met with HM Inspectors, are excited about being in a new building. Children from both schools feel that more space will allow them to participate in a wider range of active learning experiences such as music and art. However, they feel the current open plan environment presents distractions and use of shared spaces between both schools restrict what they can do. They would like to see the use of dedicated spaces for activities, which should promote a more positive and inclusive learning environment. Children feel it is important that they continue to have access to shared learning experiences across both schools and afterschool clubs. They also expressed sadness about the potential loss of the forest area. Staff who met with HM Inspectors agree that a new building will create additional space and potentially provide a better learning environment for children. They believe that the existing accommodation and use of shared spaces can limit the delivery of some curricular areas for both schools, including music and physical education. Staff feel that dedicated space for each school would be beneficial in supporting learning.

2.3 Parents who met with HM Inspectors are supportive of the council's proposal to build Glenboig Community Hub that will include Glenboig Primary School. They recognise that space is limited for both of the current schools and staff work well with the space available. They believe that the new school will ease traffic congestion in the local area. Parents feel strongly that the appropriate infrastructure needs to be in place to accommodate transport and support safe walking routes to school. Parents feel it is important that collaborative working continues to offer shared learning experiences across both schools. They also believe that the council should consider appropriate modifications that could be made to the existing building to improve the learning environment for Our Lady and St Joseph's Primary School. If the proposal is agreed, it will be important for the council to continue to consult with stakeholders, where appropriate, about the design of what is included in the new Glenboig Community Hub and Glenboig Primary School.

2.4 HM Inspectors met with church representatives from the Diocese of Motherwell. They expressed their full support for the proposal. They believe that it will decrease the need for use of shared spaces, which will enhance learning and teaching for children from both schools. They also believe that the religious ethos will be stronger throughout Our Lady and St Joseph's Primary School.

2.5 During the consultation period the council was notified of alleged inaccuracies or omissions in the proposal. The council will need to ensure that it takes the necessary steps to investigate these alleged inaccuracies or omissions. In its consultation report, the council will need to set out the actions it has taken to address any alleged inaccuracies and omissions notified to it.

3. Summary

HM Inspectors agree with the council's proposal to build a new primary school in Glenboig. The current school roll is predicted to increase further in the coming years due to planned housing developments. Glenboig Primary School is already over capacity and the existing building may not meet the demand. Should the council proceed with its proposal, it should continue to work with parents, staff and children to ensure that they are kept informed and engaged in the process. In its consultation report, the council will need to set out the actions it has taken to address any alleged inaccuracies and omissions notified to it.

HM Inspectors

February 2025

Appendix (ii)– Public and Staff Consultations Notes and FAQs

Proposal to build a new Glenboig Primary School Public Meeting held Thursday 28 November 2024 in Glenboig Primary School

Notes/Frequently Asked Questions (FAQs) Start 18:11 End 19:40

Present:

A Henry, Senior Education & Families Manager

M Dolan, Education & Families Manager

J Woodward, Acting Senior Education & Families Manager

L McBride, Education & Families Manager

C McCabe, Hub Strategy Manager

L Macpherson, Education Project Coordinator

D Lees, Education Project Coordinator

Q Question

A Answer

S Statement

MD welcomed stakeholders and introduced panel. MD explained the reason for the proposal and outlined the statutory process. MD presented the proposal to staff including Educational Benefits.

CM presented proposed site for new build primary school and the process and timescales for a new build including the intelligent brief. CM advised that the contractor would involve pupils in STEM (Science, Technology, Engineering, Maths) projects during the construction process.

Parents and pupils will be involved in the design to discuss ideas, visiting other schools and speaking with other children and staff who have previously been involved in new builds. Current school opened in 2006, the same year as Glenboig and Gartcosh growth area was considered. The existing campus will be handed over to Our Lady and St Joseph's Primary School (OLSJ).

MD discussed previous new builds including Newmains/St Brigid's, Riverbank and Chryston Hubs. Visits can be arranged for staff to Chryston (PS) Hub due to similarities of this proposal. MD reiterated this is a proposal, we have a statutory process to follow to gather feedback from stakeholders and present to Education Scotland and Committee prior to approval/non-approval.

MD opened the floor to questions:

Q In the committee paper, current zoning advised catchment area is Chryston (HS) Hub it should be Coatbridge High School.

A We will rectify and log it as inaccuracy and omission.

Q How many houses will be built?

A Plan is for over 1,000 houses in the Glenboig area. The red-line boundary land currently being scoped for the new build has 210 houses allocated but will be reduced due to hub being situated there We want to build hub and also maximise space for housing. Approx 25 houses per hectare.

Q Will the new incoming road be for all traffic?

A The road and footpath will be upgraded including appropriate space for buses. However, everything depends on where hub is finally sited.

Q Are trees being cut down?

A This is part of planning application, but the expectation is that trees will be removed. Residential value for new build houses is in the flat areas. A full appraisal will be undertaken including a cost benefit analysis. At the end of the study a decision will be made where hub is located and where houses will be built.

S We want to know how it is going to be; we knew this would happen. At our back gates we have land then trees, we think the new build will come to our back gates.

S CM advised we are unable to answer at the moment, however you can take enquiry to North Lanarkshire Council regarding this if this proposal is approved. You have a right to observation on the planning application.

S MD advised we take cognisance to all information and feedback, and we will take this to elected members in a paper to seek approval if the consultation recommendations are as such. We have to go through statutory consultation which will, if approved, include planning.

Q Why is it a hub and not a school?

A We now build hubs to show use for full community and not just the school. Out with school hours the building can be used as a community hub. Very good community groups within this area and we want to compliment other agencies, not compete. The nursery will remain in Our Lady and St Joseph's Primary School (OLSJ PS) and LCSC provision which will be in Gartcosh Community Hub. The proposal replacing a primary school. Hubs are designed in a way that spaces can be locked off for community but keep school bubble safe.

Q Outdoor provision, as I am interested because I am a football coach?

A We have a synthetic pitch on this site, we will liaise with Sport Scotland. We look at locality needs and if approved, we could look at a MUGA for proposed site.

S A concern is that there are numerous injuries on synthetic pitches.

Q Are Glenboig football team a stakeholder to be involved in discussions?

A We ask colleagues in Communities to invite stakeholders and that would be for colleagues that deal with those stakeholders on the list. Glenboig community trust will have direct links to NLC Communities Officers.

Q If more houses are built it will put pressure on Nursery. Are there plans for future provision?

A Nursery centre can offer mixed models within this setting and as some of you may be aware it sometimes it costs more for council space than private sector space, if we add too many spaces, this could suggest we are then competing. Need to wait for demand due to house building.

Q Is nursery part of Gartcosh hub?

A Yes

S MD advised the overall school population in North Lanarkshire Council has dropped by 900 pupils over the last ten years. The number of primary school pupils is decreasing and the number of secondary school pupils is increasing. Therefore, there will be spikes of pupils within year groups.

S CM explained we have projected for next 20-30 years. There is a drop in under 16 and over 65 population. School numbers are dropping, increase is in growth due to new housing developments. For every 10 houses built we get 3 children. We keep flexibility and have good modelling and we are confident both schools will cope with long term projections.

Q Probability of a building site near 'live' school whilst hub and houses are being built together?

A CM advised that is not seen as a risk. We have current construction builds within close proximity of other buildings. Our contractors are experienced in health and safety and only undertake tasks at relevant times.

Q What will the access be to the hub, there is no pavement from my housing estate currently?

A There will be active travel links including upgrades to roads, including 4 metre paths to allow pedestrians and cyclists to travel. We are subject to the same the rules as a contractor. If we are told to connect paths, we will do this. This will be part of planning applications and how they want us to link active travel plans. We have 'outside red line boundary' plans and if there is an ask to look at other issues out with the original contract we will.

Q Is there plans to build new houses at the park?

A Any area within red line boundary with a sustainable urban drainage system is within plan. We can't put any more strain on the network. However just because red line boundary is there, this does not mean it will all be housing.

Q Will there be more entrances and pedestrian crossings?

A This will be part of the intelligent brief. I am confident our planning colleagues will ensure there is access to the hub as quick as possible.

Q Why no swimming facilities? School currently pays to bus children to swimming.

A NLC has sports strategy which directs the swimming pool agenda within NLC. NLC previously had some swimming pools situated within secondary schools but they were removed.

Q Will there be provision for Additional Support needs pupils?

A There will be an LCSC provision within the new Gartcosh hub.

S It is positive to hear it's not fully open plan.

Q Are we doing away with the forest? Nursery do utilise it and want to keep in mind other stakeholders?

S Glenboig Hub is absolutely needed, however where it is situated it may interfere with the forest area and wider community.

S MD provided clarification of difference between forest and forest schools.

Q Will you remove the only forest in the area? **A** We would ask you to give this feedback as part of the consultation. If you have concerns or want this proposal to be approved. We would ask you to raise this through the formal/feedback process.

S CM advised we are technically splitting the campus but still working as a team, the nursery is a community link between both schools.

S MD stated that we have approval to seek to go out to consultation, need to go back to committee for approval or refusal to go ahead.

Q Can nursery staff respond to consultation?

A Yes, anyone can.

S MD encouraged everyone to raise valid points including the positive, through this proposal and we will listen to all stakeholders.

S Stakeholder raised that "In my opinion this is done and dusted".

S MD stated this is not a done deal, this is a process with statutory requirements. This is an opportunity to raise your concerns.

Q Were OLSJ and nursery consulted?

A Email was sent to Headteacher to cascade to staff and parent/carers. OLSJ Headteacher confirmed that they had cascaded the email to all staff, parents and carers.

Q If trees are knocked down, are they replaced by replanting?

A This would be a Planning Department decision.

Q Is it private or social houses?

A CM Housing Department will decide this after feasibility study. It could be a mix. We have quotas on how many houses we want to build as a local authority.

Q What is plan B if proposal is not accepted?

A We would need to understand objection and then deal with that. It depends on what the objection is.

S MD advised elected members to have given approval to go to consultation. When all stages have been visited, we will be able to answer on specifics based on information we have or able to ascertain.

Q Is the issue that the current school may be over capacity by 2026 by a third?

A We will work with colleagues and establishment to manage and monitor.

MD asked if there were any further questions or any comments. MD asked if everyone was in agreement, and that there were no further queries during the formal part of this public consultation that we would end the meeting early. All agreed and MD stated that if there were any questions that they felt could be voiced officers would be here to answer and advise.

MD closed the presentation and thanked everyone for their time and encouraged all stakeholders to fill in the feedback forms or via email address. Confirmed presentation, notes of meeting/FAQs will be updated on website by 5 December 2024.

Appendix (iv) Equality Impact Assessment Form

Author	Michael Dolan	Contact details	Dolanmi@northlan.gov.uk
Owner	Gerard McLaughlin		mclaughing@northlan.gov.uk

EqlA version number	01	EqlA status	Complete		Incomplete (Ongoing)	X
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If Incomplete please say why - for instance pending further consultation / research	Each phase of project and implementation to be continuously reviewed.
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Governance Committee	Education, Children & Families	Date approved	21.05.2024
Review date			

Section 1. About the Policy

1.1 Name of the policy / strategy / function / procedure:

Proposal to reconfigure Early Learning & Childcare and primary education in the West area of Cumbernauld

Is this a: -

A new policy /strategy / function / procedure / service

Budget saving

Review of policy /strategy / function / procedure

Review of Service

Other (please specify) Community Asset Transfer

Y

Y

Y

Is this a key strategic decision subject to the Fairer Scotland Duty Yes, in relation to the Fairer Scotland Duty requirement for public bodies “to actively consider how they could reduce inequalities of outcome in any major strategic decision they make.”

Y

1.2 Person Responsible for the policy etc.	
Name:	Job Title and Service / Team:
Gerard McLaughlin	Chief Officer (North)

1.3 What is the scope of the assessment?	✓	Detail where appropriate
Whole of the organisation		
Service specific	Y	Education
Discipline specific	Y	Primary
Other	Y	<p>The proposal in this document is to build a new facility incorporating a new build Glenboig Primary School. There are two main reasons for this proposal:</p> <p>The pupils currently at Glenboig Primary School will benefit educationally by attending new build school which can offer a wider range of educational opportunities (see Educational and Community Benefits sections below) in a facility with an adequate number of learning and teaching spaces to serve this pupil population.</p> <p>The current joint campus which Glenboig Primary School shares with Our Lady and St Joseph's Primary School does not have sufficient capacity to serve the growing population in this area. The decoupling of Glenboig Primary School from the existing joint campus will provide new facilities for Glenboig Primary School and create additional capacity for Our Lady and St Joseph's Primary School within the existing school grounds.</p>

1.4 What is the policy/ strategy/ function/ saving trying to achieve / do?
<ul style="list-style-type: none"> It will provide better learning opportunities for the children of Our Lady & St Joseph's Primary School and Glenboig Primary School. Currently, the use of shared spaces within the joint campus is under pressure with the numbers of children attending. The roll in both schools is likely to grow over time making the situation more difficult. Primary School will be able to use space more flexibly. Presently, staff find it difficult to find areas to work quietly with small groups or individual children. In this, as well as other regards, the proposal will bring benefits to all children including those with additional barriers to learning. The new school will be built to facilitate greater opportunities for active and outdoor learning whilst also making best use of the latest technology to enhance digital learning.

1.5 If this is a budget saving, how will the saving be achieved?
n/a

Section 2. What do I know now?

2.1 Who are the stakeholders and beneficiaries?

- Pupils who attend Glenboig Primary School
- Parents/Carers of pupils who attend Glenboig Primary School
- Employees: Head Teachers, Cluster Support Teachers (CSTs), CIILs, teaching and support staff.
- Managers: The strategic and operational team who will be responsible for the delivery of the project.
- Other services involved such as Inclusion, Facility Support, Corporate Communications, Estate Management teams.
 - Third sector and multi-agency partners involved with pupils and families
 - Partner teams/departments at NLC: Social Work, Educational Psychology, Estates, and HR colleagues

2.2 What data, consultation, research and other evidence or information is available relevant to this assessment? (This is a desktop exercise)

It is recognised that fundamental changes are required, including higher quality facilities and increased collaboration between schools and services to benefit pupils and their families, staff and the delivery of a full and robust learning experience. The new facilities will offer many educational benefits to all pupils as outlined in the proposal document approved 21 May 2024.

A consultation process will be carried out in accordance with the terms of the Schools (Consultation) (Scotland) Act 2010 and the amendments contained in the Children and Young People (Scotland) Act 2014. It is within this statutory framework that Education and Families, has engaged in a consultation exercise with all relevant consultees.

Children who attend Glenboig Primary School and their families will be consulted throughout the ASN reconfiguration process to hear views. These views will be taken into account throughout the consultation and decision making process.

The Statutory Consultation is due to begin on 4 November 2024 and will end on 17 December 2024.

A public Consultation Meeting will be held week beginning 25 November 2024. A Communication Strategy has been developed to identify all stakeholders, including priority groups, and a variety of communication methods will be employed to suit different audiences.

2.3 Considering the information in Section 1 and 2.1 and 2.2					
2.3.1 If this policy is subject to the FSD what does it suggest about the impact or potential impact on socio-economic disadvantage? (please refer to FSD Interim Guidance)					
Low income	n/a				
Low wealth	n/a				
Material deprivation	n/a				
Area deprivation	n/a				
2.3.2 Are any of the people communities listed below likely to be more affected by this policy than others?					
People who share one or more of the protected characteristics of the Equality Act 2010	Yes	Details	No	Details	Don't Know
Age (a particular age or range of ages)	Y	3-12 years			
Disabled people and people with long term health conditions	N				
Women and men, girls and boys	N				
People defined by their race, colour and nationality, ethnic or national origins.	N				
Married people and civil partners	N				
Pregnant women and new mothers (including breastfeeding women)	N				
Lesbian, gay and bisexual people	N				
People transitioning from one gender to another	N				
People of different religions or beliefs or non-beliefs	N				
<u>Other groups</u>					
Children and families	Y	The new build school is intended to improve and enhance provision for pupils who attend Glenboig Primary School			

Homeless people	N				
People who are care experienced	N				
Care leavers	N				
Carers – paid / unpaid, family members	N				
Asylum seekers	N				
Employees – full and part time. Including SES, MAs etc.	Y	<p>Staff concerns will be addressed under the council's job sizing and other Human Resource policies.</p> <p>Teaching staff who attend Glenboig Primary School may experience a change to their location.</p> <p>Non-teaching staff who attend Glenboig Primary School may experience a change to their location.</p>			
Others	Y	Taxi and bus contractors may experience changes to existing contracts.			

2.4 Do you have evidence or reason to believe that this policy will, or may potentially affect the Council's duty to: (Please tick all that apply).			
	Yes	No	Don't Know
1. Eliminate unlawful discrimination, harassment and victimisation and any other conduct prohibited by the Equality Act 2010?	n/a		
2. Advance equality of opportunity between people who share a relevant protected characteristic and those who do not	Yes		
3. Foster good relations between people who share a protected characteristic and those who do not?	Yes		
4. Protect and promote human rights?	Yes		
5. Reduce socio-economic disadvantage	Yes		
<p>It is expected that pupils who attend Glenboig Primary School will benefit from an improvement in the quality of individualised teaching and learning and future life opportunities.</p> <p>Notably, long-term socioeconomic advantage is expected to be fostered across North Lanarkshire due to the investment in school estates.</p>			

Section 3. What else do I need to know /find out?

3.1 Further consultation – Please use the table directly below to say who you will consult with (tick Yes or No). Consider those groups from section 2.3 where you ticked yes or don't know. Once consultation has taken place provide the details below.			
<u>People and communities</u>	Yes	No	Describe what you did, with whom and when. Please provide a brief summary of the responses gained and links to relevant documents, as well as any actions
Age (a particular age or range of ages)	Y		<p>Children under the age of 12 and families will be consulted throughout the design period.</p> <p>Statutory Consultation on the proposal commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>Staff and Parent Councils will be met with separately but will also be invited to the public meeting.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p>
Disabled people and people with long term health conditions	Y		<p>Children under the age of 12 and families will be consulted throughout the design period.</p>

			<p>Statutory Consultation on the proposal commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>Staff and Parent Councils will be met with separately but will also be invited to the public meeting.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p> <p>Statutory Consultation commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>Staff and Parent Councils will be met with separately but will also be invited to the public meeting.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p>
Women and men, girls and boys	Y		<p>Teaching staff have and will continue to be consulted about proposed changes that are due to be carried out.</p> <p>Statutory Consultation commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p>
People defined by their race, colour and nationality, ethnic or national origins.		N	
Married people and civil partners		N	
Pregnant women and new mothers and breastfeeding women.		N	
Lesbian, gay and bisexual people		N	
People transitioning from one gender to another		N	
People of different religions or beliefs or non-beliefs		N	

<u>Other groups</u>		N	
Children and families	Y		<p>Children under the age of 12 and families will be consulted throughout the design period.</p> <p>Statutory Consultation on the proposal commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>Staff and Parent Councils will be met with separately but will also be invited to the public meeting.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p>
Homeless people			n/a
Care Experienced people	Y		<p>Statutory Consultation on the proposal commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p>
Care leavers	Y		<p>Statutory Consultation on the proposal commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p>
Carers – paid / unpaid, family members	Y		<p>Statutory Consultation on the proposal commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p>
Asylum Seekers		N	
Trade Unions	Y		Teaching staff have and will continue to be consulted about proposed asset rationalisation changes that are due to be carried out.

			<p>There will be Trade Union and HR consultations with affected staff members from Bothwellpark High School.</p> <p>Children under the age of 12 and families will be consulted throughout consultation period to hear views.</p> <p>Statutory Consultation commenced on 4 November 2024 and will end on 17 December 2024</p> <p>Public Consultation Meeting will be held week beginning 25 November 2024.</p> <p>Staff and Parent Councils will be met with separately but will also be invited to the public meeting.</p> <p>The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.</p>
Employee Equality Forum		N	
Others		N	

3.2 What additional research or data is required?

Continuous consultation with all school and community stakeholders to obtain and consider views.

Children under the age of 12 and families will be consulted throughout consultation period to hear views.

Statutory Consultation commenced on 4 November 2024 and will end on 17 December 2024

Public Consultation Meeting will be held week beginning 25 November 2024.

Staff and Parent Councils will be met with separately but will also be invited to the public meeting.

The Consultation Final Outcome Report will be presented to Education & Families Committee week beginning for approval and decision published thereafter.

Information gained through the consultation process will be analysed and, where views align with 1.4 above, will be taken into account.

3.3 What does the additional research and data tell you about potential or known effects?

FAQs based on feedback from Stakeholders along with questions raised at the public consultation meetings on 28 November 2024 will allow further analysis of the effects. This EQIA will continue to be reviewed throughout the process.

Section 4. Assessing the impact and strengthening the policy

Considering all the evidence you now have from section 1-3, how will the policy affect different people and communities in relation to equality, socio-economic disadvantage and human rights?

4.1 How does/will the policy and resulting activity affect those with the characteristics listed below (including employees)? Please use the table below to provide details.

	Detail any Positive impact	Detail any adverse impact	If adverse, how can we mitigate this? Where no mitigating action is planned, please say why not
Age (a particular age or range of ages)	3-12 years The proposal within the statutory consultation will have an impact on all children who attend Glenboig Primary School	The impact of change on children and young people	Extensive statutory consultation processes with pupils and families from Glenboig Primary School Careful transition planning will be developed to allow pupils to anticipate the changes.
Disabled people and people with long term health conditions	The new school will be fully accessible to disabled learners as required by the Equality Act (2010). This will be ensured through the delivery of the council's equality outcomes, promoting inclusive design protocol and partnership with North Lanarkshire Disability Access Panel	There may be adverse experiences for some pupils should their teaching environment change.	This will be ensured through the delivery of the council's equality outcomes, promoting inclusive design protocol and partnership with North Lanarkshire Disability Access Panel
Women and men, girls and boys	n/a		
People defined by their race, colour and nationality, ethnic or national origins.	n/a		
Married people and civil partners	n/a		
Pregnant women and new mothers (including breastfeeding women)	n/a		

Lesbian, gay and bisexual people	n/a		
People transitioning from one gender to another	n/a		
People of different religions or beliefs or non-beliefs	n/a		
<u>Other groups</u>			
Children and families	The proposal within the statutory consultation will have an impact on all children who attend Glenboig Primary School and their families.	The impact of change on children and young people and their families.	<p>Extensive statutory consultation processes with pupils and families Glenboig Primary School</p> <p>Careful transition planning will be developed to allow pupils to anticipate the changes.</p> <p>The Parent Councils and parents will be included in the consultations.</p>
Homeless people	n/a		
Looked after and accommodated people	Pupils, including care-experienced children, in both schools and will receive robust needs-based support promptly when required. Support will end when the requirement ceases, thus encouraging the independence of pupils and supporting an inclusive pedagogy within schools whereby pupils of all abilities are encouraged to reach their fullest potential.	As above, there may be adverse experiences for some pupils should their teaching environment change.	<p>Extensive statutory consultation processes with pupils and families.</p> <p>Enhanced transition planning to allow pupils to anticipate the changes.</p>
Care leavers	Pupils in both schools, including care-experienced pupils, will receive robust needs-based support promptly when required. Support will end when the requirement ceases, thus encouraging the	As above, there may be adverse experiences for some pupils should their teaching environment change.	<p>Extensive statutory consultation processes with pupils and families.</p> <p>Enhanced transition planning to allow</p>

	independence of pupils and supporting an inclusive pedagogy within schools whereby pupils of all abilities are encouraged to reach their fullest potential.		pupils to anticipate the changes.
Carers – paid / unpaid, family members	n/a		
Asylum Seekers	n/a		
Employees – full and part time. Including SES, MAs etc.	Access to flexible teaching areas to improve teaching and learning. Better working environments for staff resulting in improvements in Health and Wellbeing.	Staff may experience adverse experience by being asked to change work location	Continue to work closely with Trade Unions and HR Business Partners to review the proposed upcoming changes.
Others			

4.2 What measures could be taken to strengthen the policy / strategy to help advance equality of opportunity, foster good relations, promote human rights and reduce socio-economic disadvantage.

Continued consultation with relevant stakeholders throughout the consultation process and beyond if the policy is adopted.

Enhanced transition planning to allow pupils and parents/carers to anticipate the changes.

4.3 Considering questions 4.1 and 4.2 what actions / measures will be put in place before introducing this policy please provide details.

Action	Timescales	Responsible Officer	Review details (include timescales)
Statutory consultation process.	4 November 2024 – 17 December 2024	Michael Dolan, Education & Families Manager Maryann McGorry, Project Manager	Statutory Consultation to begin on 4 November 2024 to 17 December 2024 Public Consultation meeting will take place week beginning 25 November 2024 Ongoing consultation with staff/parents throughout transition process.

An ongoing thorough review of the proposal	Present and ongoing	Michael Dolan, Education & Families Manager Maryann McGorry, Project Manager	Continued liaison with necessary stakeholders.
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Section 5. Monitoring, evaluating and reviewing

5.1. How will you monitor the impact and effectiveness of the new policy?

- Monitoring and evaluating the quality of the learning outcomes of both schools (Glenboig Primary School and Our Lady and St Joseph Primary and nursery pupils) and the increased access to experiences and opportunities for pupils.

Section 6. Making a decision and sign-off

Recommendation	Tick	Comment (where applicable, please give more information e.g. where to pilot, what modifications, etc.)	Timescales
Introduce the policy			Completion date of June 2024 Implementation date August 2025 and onwards
Adjust the policy then introduce			
Introduce the policy with justification regarding potential adverse impact			
Stop and withdraw the policy			

Name of Policy	Proposal to build a new Glenboig Primary School
Head of Service /Senior Manager sign-off:	

Name	Job title and division/ team	Date	Signature
Gerard McLaughlin	Head of Education & Families	21 May 2024	<i>Gerard S. McLaughlin</i>

1. For further information please contact:

Name:	Michael Dolan
Job title:	Education & Families Manager
Service:	Education, Children and Families
Contact details:	Dolanmi@northlan.gov.uk

North Lanarkshire Council Report

Education, Children and Families Committee

Does this report require to be approved?

☒ Yes ☐ No

Ref BS

Date

20/05/25

School Term Review

From Barry Smedley, Chief Officer (Education – North)

Email smedleybar@northlan.gov.uk **Telephone** 07919245004

Executive Summary

Following a motion approved at the Council Committee on 3 October 2024, and a further report approved at the Education, Children and Families Committee on the 25th of February 2025, a school holiday consultation was recently undertaken. This consultation was to determine stakeholder views on school holiday arrangements from session 2026-2027 and beyond.

A previous consultation regarding school holiday arrangements was undertaken in April/May 2023, however, responses were low (circa 9,000 responses in total). This equated to circa 12.2% of eligible parent/ carers and circa 31.7% of eligible school-based staff completing the survey.

This report details the outcome of the current school holiday consultation.

Recommendations

It is recommended that Committee:

- 1) Note the outcome of the school holiday consultation.
- 2) Approves that future school holiday periods reflect the arrangements as detailed in Option A to reflect the responses from the majority of stakeholders.

The Plan for North Lanarkshire

Priority	Support all children and young people to realise their full potential
Ambition statement	(10) Engage with children, young people, parents, carers, and families to help all children and young people reach their full potential
Programme of Work	Brighter Futures

1. Background

- 1.1 Following a motion being approved on the 3rd of October 2024 at the Council Committee, and approval at the Education, Children and Families Committee on the 25th February, a consultation was launched in March 2025 to determine stakeholder views on North Lanarkshire's school holiday arrangements from session 2026-27 and beyond.
- 1.2 A previous consultation was carried out in 2023, however, the Service's view was the low turnout did not provide enough information to determine if this outcome was representative of the view across North Lanarkshire.
- 1.3 As noted in February's report, two options were presented for school holiday arrangements:
 - Option A was broadly in line with current arrangements and included the September weekend, one week in October, and a Monday and Tuesday holiday for the February mid-term break.
 - Option B offered alternative arrangements, with one day less at the September weekend, two weeks holiday in October, and a Friday/Monday holiday for the February mid-term break. Additionally, the February in-set day was moved to January, and holidays were reduced in December, April and May.
- 1.4 It is worth noting that with both options, staff would still work 195 days per academic session (August to June). 190 of these would be teaching days, with the remaining five being used by staff for professional development activity (In-Service Days).
- 1.5 Importantly, from the outset the service was clear that the overriding factor for consideration was that any proposed change to school holiday arrangements would *'ensure that there is no detriment to the education/teaching offering'* and the consultation was based on this principle.

2. Report

- 2.1 In line with [Schools \(Consultation\) \(Scotland\) Act 2010: guidance - gov.scot](#) advice, a consultation on school holiday arrangements is non-statutory, and as such, does not require a six-week consultation period.
- 2.2 A Microsoft Form was created to gather consultation responses, with a link to accompanying Frequently Asked Questions (FAQs). This Form was live from Wednesday 19th March until Friday 4th April (a period of 17 days).
- 2.3 To maximise the number of responses received during the consultation period, a number of communication methods were utilised to ensure maximum reach. This included GroupCall messages to all parents, carers and staff, posts on social media platforms, emails to subscribers of school topics (28,420 subscribers), information on the Council's website (consultation section) and reminders in the Education and Families weekly bulletin.

2.4 A timeline of communication was developed and is detailed below:

Wednesday 19th March

- GroupCall messages issued to all North Lanarkshire (NL) parents, carers and staff
- Social media posts (NL's Facebook page and X platform)
- Emails issued to subscribers of NL school topics
- LinkedIn post
- NL's website updated

Thursday 20th March

- Email to all NL headteachers and central team

Friday 21st March

- Bulletin entry, asking headteachers to encourage pupils to respond, where appropriate

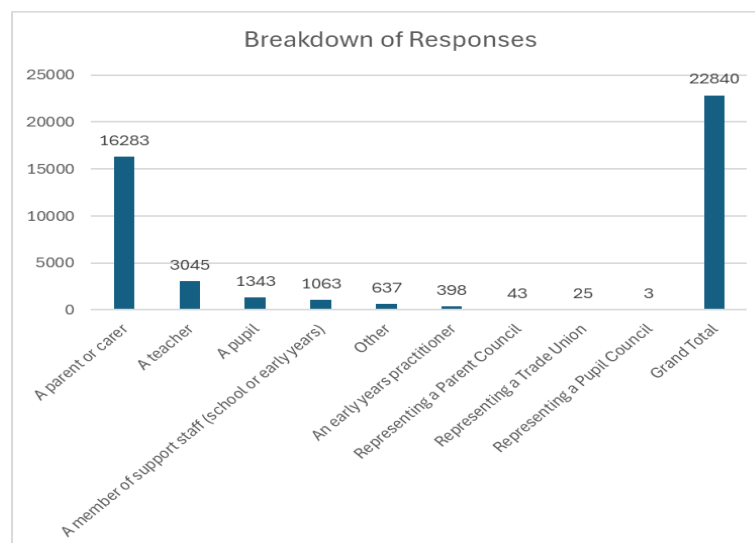
Friday 28th March

- Further GroupCall messages issued to all NL parents, carers and staff
- Further social media posts (NL's Facebook page and X platform)
- Further emails issued to subscribers of NL school topics
- Further bulletin entry

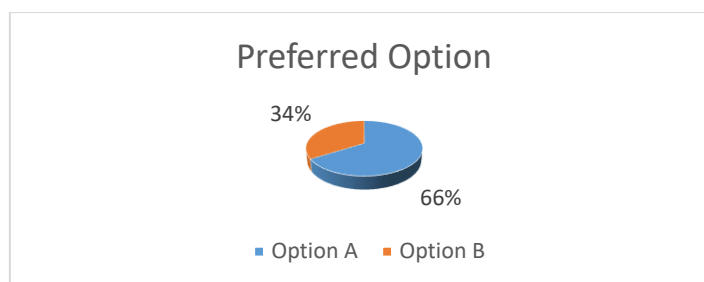
Wednesday 2nd April

- Final GroupCall messages issued to all NL parents, carers and staff
- Final social media post (NL's Facebook page)
- Final emails issued to all NL subscribers

2.5 Results of the consultation have now been collated and a total of 22,840 responses were received. This represents approximately a 250% increase in the total number of responses received during the previous consultation and equates to circa 32.62% of eligible parent/carers and circa 78.3% of eligible school-based/establishment staff completing the survey. The biggest response received was from parents and carers (approximately 71%), followed by teachers (approximately 13%). The breakdown of responses is noted below:



- 2.6 The results of the consultation indicate that the majority (66% of respondents who replied) of stakeholders prefer Option A. This is the option that is broadly in line with current arrangements. Full details of this option can be found at Appendix 1.



- 2.7 The responses are further broken down into the category of stakeholder in Table 1 below:

Stakeholder	Option A		Option B		Total
	Number	% of Total	Number	% of Total	
Parent/Carer	10445	45.7312%	5838	25.560%	16283
Teacher	2197	9.6191%	848	3.7128%	3045
Pupil	987	4.3214%	356	1.5587%	1343
Support Staff	768	3.3625%	295	1.2916%	1063
Other	388	1.6988%	249	1.0902%	637
Early Years	300	1.3135%	98	0.4291%	398
Parent Council Rep	33	0.1445%	10	0.0438%	43
Trade Union Rep	25	0.1095%	0	0%	25
Pupil Council Rep	1	0.0043%	2	0.0088%	3
	15144	66.3048%	7696	33.695%	22,840

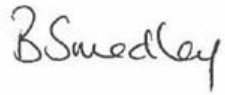
- 2.8 It is therefore recommended that future school holiday periods reflect the arrangements as detailed in Option A to reflect the responses from the majority of stakeholders.
- 2.9 As noted in February's paper, the results of this consultation will be communicated to all stakeholders in May 2025 following the Committee decision.

3. Measures of success

- 3.1 NL's school holiday arrangements represent the views of the majority of stakeholders.
-

4. Supporting documentation

- 4.1 Appendix 1 – Breakdown of respondents by school
- 4.2 Appendix 2 – Contrast of Existing and Optional School Term 2026/27

A handwritten signature in black ink, reading "BSmedley". The signature is written in a cursive, slightly slanted style.

Barry Smedley
Chief Officer (Education - North)

5. Impacts

5.1	<p>Public Sector Equality Duty and Fairer Scotland Duty</p> <p>Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>If Yes, has an assessment been carried out and published on the council's website? https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
5.2	<p>Financial impact</p> <p>Does the report contain any financial impacts?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, have all relevant financial impacts been discussed and agreed with Finance?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
5.3	<p>HR policy impact</p> <p>Does the report contain any HR policy or procedure impacts?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, have all relevant HR impacts been discussed and agreed with People Resources?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>If there is an agreement to consider an optional school term then a full consultation will be undertaken with all affected staff.</p>
5.4	<p>Legal impact</p> <p>Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
5.5	<p>Data protection impact</p> <p>Does the report / project / practice contain or involve the processing of personal data?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, is the processing of this personal data likely to result in a high risk to the data subject?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
5.6	<p>Technology / Digital impact</p> <p>Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>

	<p>Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
5.7	<p>Environmental / Carbon impact</p> <p>Does the report / project / practice contain information that has an impact on any environmental or carbon matters?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
5.8	<p>Communications impact</p> <p>Does the report contain any information that has an impact on the council's communications activities?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>If the recommendations of the report are agreed a full consultation exercise will be undertaken with all relevant parties.</p>
5.9	<p>Risk impact</p> <p>Is there a risk impact?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed?</p> <p>It is hoped that any change would have a positive effect on attendance.</p>
5.10	<p>Armed Forces Covenant Duty</p> <p>Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.</p>
5.11	<p>Children's rights and wellbeing impact</p> <p>Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC).</p> <p>As part of the consultation process, pupils will be provided with an opportunity to respond and share their views.</p> <p>If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>Depending on the outcome of the consultation, a decision will be taken on whether a CRWIA is required.</p>

Appendix One- Breakdown of Respondents by School/Establishment

NLC School Holiday Consultation April 2025		
Establishment Name	Establishment Type	Number of Responses
St Ambrose High School	High School	577
Greenfaulds High School	High School	514
St Andrew's High School	High School	491
Dalziel High School	High School	442
Airdrie Academy	High School	420
Caldervale High School	High School	403
Chryston High School	High School	379
St Maurice's High School	High School	358
Coatbridge High School	High School	355
No School/Establishment selected		347
Brannock High School	High School	344
Cumbernauld Academy	High School	334
St Aidan's High School	High School	331
St Margaret's High School	High School	331
Knowetop Primary School	Primary	328
Coltness High School	High School	318
Our Lady's High School - Cumbernauld	High School	312
Taylor High School	High School	301
Cumbernauld Primary School	Primary	286
Our Lady's High School - Motherwell	High School	282
Clyde Valley High School	High School	278
Stepps Primary School	Primary	268
Cathedral Primary School	Primary	264
Bellshill Academy	High School	249
Cardinal Newman High School	High School	246
Chryston Primary School	Primary	242
St Timothy's Primary School	Primary	226
Braidhurst High School	High School	207
Riverbank Primary School	Primary	200
Clarkston Primary School	Primary	194
Holy Cross Primary School	Primary	192
Rochsolloch Primary School	Primary	192
Calderhead High School	High School	191

Mossend Primary School	Primary	188
Ladywell Primary School	Primary	187
Glencairn Primary School	Primary	185
Hilltop Primary School	Primary	184
Balmalloch Primary School	Primary	182
Tannochside Primary School	Primary	170
Chapelhall Primary School	Primary	167
St Augustine's Primary School	Primary	167
Gartcosh Primary School	Primary	164
Kilsyth Academy	High School	160
St Aloysius' Primary School	Primary	159
Eastfield Primary School	Primary	158
Westfield Primary School	Primary	157
Baird Memorial Primary School	Primary	153
St Barbara's Primary School	Primary	152
St Helen's Primary School - Cumbernauld	Primary	151
St Stephen's Primary School - Coatbridge	Primary	151
Dykehead Primary School	Primary	150
St Aidan's Primary School	Primary	150
St Brendan's Primary School	Primary	149
St Kevin's Primary School	Primary	146
Greenhill Primary School	Primary	145
St Edward's Primary School	Primary	144
New Stevenston Primary School	Primary	137
Aitkenhead Primary School	Primary	136
St Michael's Primary School	Primary	136
Orchard Primary School	Primary	132
Calderbridge Primary school	Primary	131
Christ the King Primary School	Primary	131
St Lucy's Primary School	Primary	131
Glencryan School	ASN Primary	130
St Patrick's Primary School - Kilsyth	Primary	130
Wishaw Academy Primary School	Primary	129
St Andrew's Primary School - Cumbernauld	Primary	127
St Patrick's Primary School - Shotts	Primary	127
St John Paul II Primary School	Primary	126
Keir Hardie Memorial School	Primary	125
Glenmanor Primary School	Primary	124
Kildrum Primary School	Primary	124
Redburn School	ASN 3-18	124

St Patrick's Primary School - Coatbridge	Primary	123
Holytown Primary School	Primary	122
St Joseph's Primary School - Stepps	Primary	122
Woodlands Primary School	Primary	122
Firpark Primary School	ASN Primary	121
Muirhouse Primary School	Primary	120
Our Lady and St Francis Primary School	Primary	120
St Teresa's Primary School	Primary	116
Tollbrae Primary School	Primary	116
Golfhill Primary School	Primary	115
Langloan Primary School	Primary	112
Drumpark Primary School	Primary	110
St Gerard's Primary School	Primary	110
Abronhill Primary School	Primary	109
Holy Family Primary School	Primary	108
St Mary's Primary School - Coatbridge	Primary	108
St Thomas' Primary School - Wishaw	Primary	108
Noble Primary School	Primary	105
Whitelees Primary School	Primary	104
Stane Primary School	Primary	100
Condorrat Primary School	Primary	97
Lawmuir Primary School	Primary	97
St Ignatius' Primary School	Primary	97
St Patrick's Primary School - New Stevenston	Primary	97
Morningside Primary School	Primary	92
Ravenswood Primary School	Primary	92
Sacred Heart Primary School - Bellshill	Primary	91
Firpark Secondary School	ASN Secondary	90
St Dominic's Primary School and Nursery	Primary	90
New Monkland Primary School	Primary	88
All Saints Primary School	Primary	87
Glengowan Primary School - Caldercruix	Primary	86
Cambusnethan Primary School	Primary	85
Kirkshaws Primary School	Primary	82
Newmains Primary School	Primary	82
St Monica's Primary School	Primary	81
Netherton Primary School	Primary	79
St Margaret of Scotland Primary School	Primary	78
Buchanan High	ASN Secondary	76
Our Lady and St Joseph's Primary School	Primary	76

Alexander Peden Primary School	Primary	74
St Mary's Primary School - Cleland	Primary	74
Glenboig Primary School	Primary	73
St Brigid's Primary School	Primary	72
Victoria Primary School	Primary	72
Auchinloch Primary School	Primary	71
Berryhill Primary School	Primary	70
Bargeddie Primary School	Primary	69
St Serf's Primary School	Primary	68
Muir Street Primary School	Primary	66
St Andrew's Primary School - Airdrie	Primary	65
Newarthill Primary School	Primary	64
St David's Primary School	Primary	63
Thornlie Primary School	Primary	63
St Mary's Primary School - Cumbernauld	Primary	62
Kilsyth Primary School	Primary	61
St Bartholomew's Primary School	Primary	59
Chapelside Primary School	Primary	57
St Bernadette's Primary School	Primary	57
Greengairs Primary School	Primary	56
Logans Primary School	Primary	55
Allanton Primary School	Primary	53
Carbrain Primary School	Primary	52
St Bernard's Primary School	Primary	49
Calderbank Primary School	Primary	48
Cleland Primary School	Primary	48
Old Monkland Primary School	Primary	48
Clydeview School	ASN Primary	47
Townhead Primary School	Primary	47
Plains Primary School	Primary	45
Bothwellpark High School	High School	44
Shawhead Primary School	Primary	40
Corpus Christi Primary School	Primary	38
Kirk o' Shotts Primary School	Primary	33
Newmains Family Learning Centre	Early Years	31
St Mary's Primary School - Caldercruix	Primary	27
Ailsa Family Learning Centre	Early Years	26
Chapelgreen Primary School	Primary	25
Laburnum Family Learning Centre	Early Years	25
Shotts Family Learning Centre	Early Years	25

Banton Primary School	Primary	24
Kildrum Family Learning Centre	Early Years	24
Mavisbank School	ASN Secondary	24
Forgewood Family Learning Centre	Early Years	21
Stepping Stones Family Learning Centre	Early Years	21
St. Patrick's Family Learning Centre	Early Years	20
Netherton Family Learning Centre	Early Years	18
Richard Stewart Family Learning Centre	Early Years	17
Cumbernauld Village family Learning Centre	Early Years	16
Dunbeth Family Learning Centre	Early Years	16
Abernethyn Family Learning Centre	Early Years	15
Jigsaw Family Learning Centre	Early Years	15
Willowbank School	ASN Primary	15
Wishaw Family Learning Centre	Early Years	15
Bellshill Family Learning Centre	Early Years	14
Petersburn Family Learning Centre	Early Years	14
Shawhead Family Learning Centre	Early Years	14
Craigneuk Family Learning Centre	Early Years	13
Portland High School	ASN Secondary	13
Calderview Family Learning Centre	Early Years	11
Broomland Family Learning Centre	Early Years	10
Fallside Secondary School	ASN Secondary	10
Innerleithen Family Learning Centre	Early Years	9
Devonview Family Learning Centre	Early Years	6
Pentland School	ASN Primary	6
Virtual School	Virtual School	2

Appendix Two – Options proposed during NL’s school holiday consultation

Option A, Session 2026-2027– broadly based on existing school term arrangements. This option retains the traditional September weekend, one week in October and a Monday and Tuesday holiday for the February mid-term break.

WB	MON	TUE	WED	THU	FRI	WB	MON	TUE	WED	THU	FRI	WB	MON	TUE	WED	THU	FRI	WB	MON	TUE	WED	THU	FRI
						Oct 26	Pupils Return					Jan 18						Apr 12	H	Inset 5			
Aug 10	Inset 1	Inset 2	Pupils Return			Nov 2						Jan 25						Apr 19					
Aug 17						Nov 9						Feb 1						Apr 26					
Aug 24						Nov 16	Inset 3					Feb 8						May 3	H				
Aug 31						Nov 23						Feb 15	H	H	Inset 4			May 10					
Sep 7						Nov 30						Feb 22						May 17					
Sept 14						Dec 7						Mar 1						May 24					H
Sept 21					H	Dec 14				Schools close 2:30	H	Mar 8						May 31	H				
Sep 28	H					Dec 21	H	H	H	H	H	Mar 15						June 7					
Oct 5						Dec 28	H	H	H	H	H	Mar 22				2:30 close	H	June 14					
Oct 12	H	H	H	H	H	Jan 4	Pupils Return					Mar 29	H	H	H	H	H	June 21					Schools close 1.30
Oct 19						Jan 11						Apr 5	H	H	H	H	H	June 28	H	H	H	H	H

Option B, Session 2026-2027– alternative arrangements. This option results in one day less at the September weekend, an additional week in October and a Friday/Monday holiday for the February mid-term break, with the February inset moved to January. It also results in one day less holidays in December and April and two days less holidays in May.

Options Appraisal: Proposed School Holidays 2026/27																								
WB	MON	TUE	WED	THU	FRI	WB	MON	TUE	WED	THU	FRI	WB	MON	TUE	WED	THU	FRI	WB	MON	TUE	WED	THU	FRI	
						Oct 26	Pupils Return					Jan 18						Apr 12	Inset 5					
Aug 10	Inset 1	Inset 2	Pupils Return			Nov 2						Jan 25						Apr 19						
Aug 17						Nov 9						Feb 1						Apr 26						
Aug 24						Nov 16						Feb 8					H	May 3						
Aug 31						Nov 23	Inset 3					Feb 15	H					May 10						
Sep 7						Nov 30						Feb 22						May 17						
Sept 14						Dec 7						Mar 1						May 24						
Sept 21					H	Dec 14					Schools close 2:30	Mar 8						May 31	H					
Sep 28						Dec 21	H	H	H	H	H	Mar 15						June 7						
Oct 5						Dec 28	H	H	H	H	H	Mar 22				2:30 close	H	June 14						
Oct 12	H	H	H	H	H	Jan 4	Inset 4	Pupils return				Mar 29	H	H	H	H	H	June 21					Schools close 1.30	
Oct 19	H	H	H	H	H	Jan 11						Apr 5	H	H	H	H	H	June 28	H	H	H	H	H	

Difference Between Optional and Existing

- Lose 28th September (-1)
- Gain 19th – 23rd October (+5)
- Lose 18th December (-1)
- Change of February break to Friday and Monday as opposed to Monday and Tuesday.
- February Inset moved to January
- Lose Monday 12th April (-1)
- Lose 3rd and 28th May (-2)

Education, Children and Families Committee

Does this report require to be approved? ☒ Yes ☐ No

Ref: BS / TO'H

Date 20/05/25

Review of the North Lanarkshire Scheme of Devolved School Management

From: Barry Smedley

E-mail: SmedleyBar@northlan.gov.uk **Telephone:** 07919 245004

Executive Summary

Scottish local authorities have a statutory responsibility to operate a scheme of Devolved School Management which is typically referred to as DSM.

Scottish Government best practice guidance further advises that each DSM scheme should be reviewed and updated on a regular basis within a maximum 3 yearly cycle. The current North Lanarkshire DSM scheme was previously approved in September 2022.

A proposed DSM scheme incorporating the academic terms from August 2025 – July 2028 is attached as Appendix 1.

The North Lanarkshire DSM scheme will be kept under ongoing scrutiny and further reports will be submitted to committee if substantive amendments or changes to the approved scheme are required.

Recommendations

It is recommended that the Education, Children and Families Committee

- (1) Review and approve the proposed scheme of Devolved School Management for the period August 2025 to July 2028.

The Plan for North Lanarkshire

Priority	Improve North Lanarkshire's resource base
Ambition statement	(25) Ensure intelligent use of data and information to support fully evidence based decision making and future planning
Programme of Work	Brighter Futures / One Service

1. Background

- 1.1. Devolved School Management (DSM) was introduced in 1993 and the policy was made a statutory requirement per 'The Standards in Scotland's Schools etc Act 2000' which committed education authorities to operate a formal DSM scheme for individual schools. DSM is essentially a partnership agreement between an education authority and schools / early years establishments which delegates responsibility and control of a large portion of school or early years budgets to individual Heads of Establishment.
 - 1.2. The Scottish Government has periodically produced supplementary guidelines to support the practical implementation and operation of DSM schemes. The current guidelines and framework can be accessed via the following link:- [Devolved School Management Guidelines](#) and are also attached as Appendices 2 & 3. One of the key expectations is that education authorities review and update their DSM schemes within a maximum 3 year timeframe from the previous review.
 - 1.3. The first North Lanarkshire DSM scheme was formally introduced in 1997 and has been subject to periodic assessment, updates, and amendments with the last formal review having been conducted during 2022 and approved at the Education, Children and Families committee on 13 September 2022.
 - 1.4. Whilst the government guidance provides an overarching DSM framework, each authority can develop its own administrative and governance arrangements which reflect local needs and specific spending priorities.
 - 1.5. The information and proposals in this report have been agreed by the Section 95 Officer.
-

2. Report

DSM Approach

- 2.1. When undertaking the DSM review the Service has considered and applied each aspect of the Scottish Government guidelines to future operational practice. This approach also includes adopting the Scottish Government publication framework which ensures the Service has produced a written response within the proposed scheme to each action point referenced in the guidance.
- 2.2. Running in parallel to the Service review, Internal Audit has recently completed an audit of the North Lanarkshire DSM scheme. In summary Internal Audit noted '*the DSM scheme is largely consistent with Scottish Government guidance and best practice, and the arrangements in place to provide good quality and timely financial reporting are generally sound*'. The Service has incorporated the key Internal Audit recommendations into the proposed DSM scheme which should further strengthen the operating model moving forward.
- 2.3. The Scottish Government also encourage authorities to engage with key stakeholders during the process of developing or reviewing DSM schemes. In preparation of the proposed scheme the Service has undertaken its widest DSM briefing exercise to date which has included:

- a. Heads of Establishment.
 - b. Teacher Trade Unions
 - c. Single Status Trade Unions
 - d. Parents Consultative Group
 - e. Pupil Groups
 - f. Other Council Services
 - g. Elected Members
- 2.4 The proposed DSM scheme has to be delivered and managed within the overall funding envelope available to the Service.

DSM Aims & Values

- 2.5 The evolution of the current set of national DSM guidelines can be traced back to consultations which began in June 2018. The Scottish Government sought to gather evidence and feedback from authorities on potential changes to DSM as part of the wider 'Fair Funding to Achieve Excellence and Equity in Education' policy.
- 2.6 A formal review of DSM guidelines was then agreed as part of the Education Reform Joint Agreement which was published in late 2018 followed by the establishment of a Fair Funding Reference Group. This group established four principles that would underpin future national DSM guidance:
- a. Subsidiarity and empowerment
 - b. Collaboration
 - c. Accountability and responsibility
 - d. Clarity and equity
- 2.7 These principles reflect the National Improvement Framework aims of excellence through raising attainment and achieving equity, and the four outcomes of the Fair Funding consultation as outlined below:
- a. *Support excellence and equity*
Ensuring every child and young person has the same opportunity to succeed.
 - b. *Be fair*
Placing the needs of all children and young people at the centre.
 - c. *Be simple, transparent, and predictable*
Ensuring the costs of delivering education can be easily understood and explained and that schools are able to manage and plan with certainty.
 - d. *Deliver value for money*
Ensuring that every penny spent is used effectively.
- 2.8 North Lanarkshire has demonstrated its commitment to these principles by, for example, publishing all the establishment budget allocation formulas and funding models, fully funding the annual budgets of establishments each year, and adhering to the DSM rules and commitments through each cycle.

- 2.9 Furthermore in the recent past North Lanarkshire has made additional resource commitments to establishments during the post Covid education recovery period and to address national teacher number targets.

Proposed Changes to the DSM Scheme

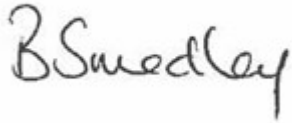
- 2.10 The proposed changes to the DSM operating model in comparison to the current scheme include:
- a. Heads of Establishment have been directed to use approved purchasing pathways.
 - b. There are enhanced Service governance arrangements around the in-year financial performance of individual schools.
 - c. If an establishment records an in-year overspend of 1% or more of their aggregate DSM budget, Heads of Establishment have to prepare a plan for future years highlighting how the establishment will return to a balanced budget position.
 - d. There is a description of the financial and management information reports establishments will receive each accounting period.
 - e. There will be mandatory DSM training for new Heads of Establishment.
 - f. The allocation of classroom assistant posts to primary schools has been removed from the DSM scheme.
 - g. An allocation of learning assistant posts for primary, secondary and ASN schools has been included in the DSM scheme.
 - h. The virement limit for teacher budget lines has been reduced from 1fte to 0.5fte pro-rata to the value of an unpromoted teacher post.
 - i. Heads of Establishment should engage and raise awareness of DSM with key stakeholders. To support this process the Service has committed to provide establishments with an annual budget pack.
 - j. Establishments will continue to be allocated TV Licence and Security System budgets, however these budgets will be categorised as excluded from DSM rules.
 - k. PPP/PFI budgets will not be allocated to establishments. Going forward these budgets will be managed centrally by the Service.
 - l. There is enhanced clarity and reference to national and Council policies which underpin the DSM scheme. These policies should be adhered to and applied by Heads of Establishment.

3. Measures of success

- 3.1. An approved DSM is introduced for the period August 2025 – July 2028.
-

4. Supporting documentation

- 4.1 Appendix 1 Proposed DSM Scheme August 2025 – July 2028.
Appendix 2 National DSM Guidelines.
Appendix 3 National DSM Framework

A handwritten signature in black ink, reading "BSmedley". The signature is written in a cursive, slightly slanted style.

Barry Smedley
Chief Officer (Education North)

5. Impacts

5.1 Public Sector Equality Duty and Fairer Scotland Duty Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact? If Yes, has an assessment been carried out and published on the council's website? https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments Yes <input type="checkbox"/> No <input type="checkbox"/>
5.2 Financial impact Does the report contain any financial impacts? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, have all relevant financial impacts been discussed and agreed with Finance? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact? The proposed changes to the DSM scheme have been assessed and can be supported within existing Service budgets.
5.3 HR policy impact Does the report contain any HR policy or procedure impacts? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant HR impacts been discussed and agreed with People Resources? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.4 Legal impact Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.5 Data protection impact Does the report / project / practice contain or involve the processing of personal data? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, is the processing of this personal data likely to result in a high risk to the data subject? Yes <input type="checkbox"/> No <input type="checkbox"/>

<p>If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>5.6 Technology / Digital impact</p> <p>Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>5.7 Environmental / Carbon impact</p> <p>Does the report / project / practice contain information that has an impact on any environmental or carbon matters?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
<p>5.8 Communications impact</p> <p>Does the report contain any information that has an impact on the council's communications activities?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>The approved DSM scheme will be added to the Council website.</p>
<p>5.9 Risk impact</p> <p>Is there a risk impact?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed?</p>
<p>5.10 Armed Forces Covenant Duty</p> <p>Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.</p>
<p>5.11 Children's rights and wellbeing impact</p>

Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?

Yes ☒ No ☐

If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC).

During the development of the DSM scheme the Service has sought advice from staff who have been trained in the application of UNCRC and CRWIA. The resultant CRWIA reflects the Service understanding and consideration of the DSM scheme when assessed against the relevant UNCRC articles.

If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?

Yes ☒ No ☐

North Lanarkshire Council

Scheme of Devolved School Management

August 2025 – July 2028

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Introduction

North Lanarkshire Council has a statutory responsibility to operate a scheme of Devolved School Management which is typically referred to as DSM. The North Lanarkshire DSM scheme is outlined in this document.

The North Lanarkshire DSM scheme has been prepared and published in accordance with the Devolved School Management Framework which was jointly agreed by the Scottish Government and COSLA.

The national DSM guidance can be accessed via the following links:

[Devolved School Management Guidelines](#)
[Devolved School Management Framework](#)

In developing the DSM scheme North Lanarkshire has applied the four principles outlined by the Fair Funding Reference Group. These principles are:

- Subsidiarity and Empowerment
- Collaboration
- Accountability
- Responsibility, Clarity and Equity

This DSM scheme will operate for the 3 year period from August 2025 through to July 2028.

The North Lanarkshire education estate includes 24 stand alone nurseries, 118 Primary Schools, 23 Secondary schools and 13 Special Schools. As at September 2024 the recorded pupil population was 48,345.

Local authorities continue to operate within a challenging fiscal environment. In response the North Lanarkshire DSM scheme directs Heads of Establishment to utilise resources to deliver key Council and Service strategies whilst adhering to approved schemes of delegation, including financial and procurement regulations.

The Service recognises the importance of the many partners and stakeholders who contribute to educational provision, and especially parents and carers. All of North Lanarkshire's schools have a Parent Council. Parent Councils help parents and carers to become involved in their children's learning and provide a voice for them and their school community. The preparation and publication of the DSM scheme helps provide Parent Councils with an overview of establishment funding models and budgets. Further information on the role of Parent Councils can be accessed via the following link: [Education Scotland Parent Council Information](#)

Budget Overview

School and early years budgets are incorporated within the Education and Families Service. This Service also includes elements of Social Work (Children & Families and Justice), Employability, Community Learning and Tackling Poverty teams. The Service budget for 2024/25 is highlighted in Table 1 below.

Table 1 – Education and Families Budget 2024/25

Divisions	Annual Budget (£)
Early Years	33,500,948
Primary Schools	140,468,006
Secondary Schools	138,907,075
ASN Schools	19,463,990
Education Central Support	130,889,135
SW Children & Families	39,574,262
SW Justice	91,690
Employability	3,164,086
Community Learning	5,142,951
Tackling Poverty	1,925,071
Net Expenditure	513,127,214

The budgets which were fully devolved within the DSM scheme during 2024/25 equated to approximately £269m. Summary information in respect of the fully devolved budgets is shown in Table 2.

Table 2 – Fully Devolved DSM Budgets 2024/25

Divisions	Annual Budget (£)
Employee Costs	265,200,667
Property Costs	675,396
Supplies & Services	1,988,558
Transport Costs	173,401
Admin Costs	894,837
Payments To Other Bodies	309,656
Net Expenditure	269,242,515

Areas of Expenditure to be Devolved

The DSM scheme classifies budgets into three categories. This approach follows the national guidance which recognises that educational resources should be managed by staff who are best placed to make informed decisions on their use.

1. Fully Devolved Establishment Budgets

These budgets are fully devolved to establishments within the formal DSM scheme and are included in the calculation of year-end carry forwards and may have in-year virements applied.

The list of fully devolved budgets and allocation models are described in Appendices A, B and C.

2. Establishment Budgets Excluded from DSM Rules

It is recognised that Heads of Establishment have limited control over some budgets which are allocated to individual schools or nurseries. The national guidance outlines reasons why specific budgets may not be suitable for inclusion in an authority's DSM scheme. These explanations include:

- a. areas outside the influence of a Head Teacher
- b. areas that are too bureaucratic
- c. have unacceptable levels of risk
- d. benefit from economies of scale
- e. require professional expertise
- f. are complex by their nature.

The list of establishment budgets which have been excluded from the North Lanarkshire DSM scheme are outlined in Table 3.

Table 3 – Establishments Budgets Excluded From DSM Rules

Description	Basis of Budget Allocation
Non-Domestic Rates (NDR)	Rateable value
West of Scotland - Water Meter	Assessed per establishment
Energy Costs	Assessed per establishment
Examination Fees	Estimated presentations per establishment
Protected Salary	Assessed per establishment
Upkeep of Grounds	Assessed per establishment
Contract Hygiene Units	Assessed per establishment
Internal Transport	Assessed per establishment
TV Licences	Assessed per establishment
Security Systems	Assessed per establishment

The budgets listed in Table 3 are not included in the calculation of year-end carry forwards nor can they have in-year virements applied.

3. Other Educational Resources

Heads of Establishment should be aware there is a range of other resources and programmes which help support and enhance educational provision. These resources and programmes are managed and directed by centrally deployed officers and are therefore not part of the formal DSM scheme.

The Service will provide Heads of Establishment with ongoing updates outlining how these resources can be accessed or allocated. The approach to deploying these resources will also reflect the underlying principles of the DSM scheme including the development of fair and transparent allocation models. The programmes and supports which are managed centrally include:

1. ASN Cluster Supports
2. Pre and Post Inspection Support
3. Wellbeing Hubs

4. Probationer Teacher Programme
5. Directed Grant Funded Programmes
6. School Counselling
7. Educational Psychologist Service
8. Speech & Language Therapy Service
9. Children's Social Work Services
10. Family Support Programmes
11. Music Instructor Programme
12. Active Schools
13. Community Learning
14. School Clothing Grant
15. Education Maintenance Allowance (EMA) Awards
16. Home to School Pupil Transport
17. Long Term Staff Cover
18. Gaelic Programme
19. Pedagogy Support
20. Digital and Technology Support

General Information

Financial Regulations

North Lanarkshire Council has an approved Financial Strategy which is underpinned by a set of Financial Regulations. These documents can be accessed via the following link: [Financial Strategy & Regulations](#).

The Financial Strategy sets out the overarching framework for financial governance, planning and management. The approach is summarised in the diagram below:

Diagram 1 – North Lanarkshire Financial Strategy



The application of the Financial Regulations contributes to the effective stewardship of North Lanarkshire Council funds by ensuring public money is safeguarded and properly accounted for, and also demonstrates financial transactions and decisions are taken in an open and transparent manner.

Section 4.8 of the Financial Regulations states that all officers employed by the Council including Heads of Establishment must ensure that all financial transactions are taken in accordance with the Financial Regulations, are legally competent and are within an officers delegated powers.

Section 23.4 of the Financial Regulations refers to the special provisions granted to Heads of Establishment through the application of an approved DSM scheme.

Best Value Principles

The statutory duty of Best Value was introduced in the Local Government in Scotland Act 2003.

The Scottish Government has further developed [Best Value Guidance](#) which is framed around the following seven themes:

1. Vision and leadership
2. Governance and accountability
3. Effective use of resources
4. Partnerships and collaborative working
5. Working with communities
6. Sustainability
7. Fairness and equality

These themes continue to be embedded within North Lanarkshire's key strategies and plans including the DSM scheme.

Local Authority Commitment to DSM

North Lanarkshire demonstrates its strong commitment to DSM through its integrated policy development and operational delivery models. Examples of this approach include:

- a. Member engagement demonstrated through the formal committee review and approval of the DSM scheme.
- b. The acknowledgement and references to DSM within Council and Service policies.
- c. Recognising the importance of education provision and outcomes within the Programme of Work as a catalyst in achieving key Council ambitions.
- d. The roll out of multi-user Hub operating models within educational establishments.
- e. The contribution of other Service teams in the day to day running of educational establishments.

At a local level the DSM scheme is an empowered system whereby Heads of Establishment, schools and nursery communities, and the authority are partners, each contributing and supporting each other and respecting the different roles each play. For example, the Education and Families Service led on the development of the new DSM Scheme with significant input and feedback from Heads of Establishment and other stakeholders. During this process there was a shared belief that resourcing decisions are best made closest to the learner wherever possible, and this approach has been reflected in the DSM scheme

Heads of Establishment are also provided with a range of professional and operational support from across the Council including Financial Management, HR, Procurement, ICT, Estate and Facilities Management.

School Expenditure Within Wider Strategic Planning

[The Plan for North Lanarkshire](#) was established in 2019 with a very clear vision, inclusive growth and prosperity for all including equality of opportunities and benefits, and a fairer distribution of wealth to all North Lanarkshire's residents and communities.

This vision is about transforming the place that is North Lanarkshire. It's about enhancing local physical environments in a way that recognises the intrinsic social and health benefits gained in doing so. It's about securing holistic ways of working that integrate policies, services, and systems with only one solution in mind to target the growing complexities in society and improve outcomes for the people and communities of North Lanarkshire. It's about making North Lanarkshire the place to live, learn, work, invest, and visit.

Delivery of The Plan for North Lanarkshire is supported by an approved [Programme for Work](#), this translates the vision into priorities for action and ensures that these remain current, relevant, and deliverable. The [Strategic Policy Framework](#) sits alongside the Programme of Work to ensure an integrated approach to strategic planning and delivery of the vision through strategies, policies, and plans that are aligned to The Plan for North Lanarkshire.

Educational provision and outcomes have a key role to play in delivering the long-term vision and shaping the place that is North Lanarkshire both now and for future generations. Heads of Establishment should be aware of North Lanarkshire's strategic plans and ensure resources deployed within a school or nursery setting actively support the delivery of the Programme of Work priorities and the long-term vision for North Lanarkshire.

Scottish Negotiating Committee for Teachers and Local Negotiating Committees for Teachers Agreements

Heads of Establishment are empowered to lead, manage and develop their staff to achieve the best possible outcomes for pupils.

There are a number of approved national and local staffing policies which Heads of Establishment must follow and apply when engaging with teaching and single status employees.

Core teacher terms and conditions are included in the Scottish Negotiating Committee for Teachers (SNCT) handbook [Part 2 - SNCT Handbook](#).

In a local context the North Lanarkshire Joint Negotiating Committee for Teachers has approved the following staffing policies:

1. Management Circular F20
2. Agreed Procedures for the Redeployment of Promoted Teachers
3. Agreed Procedures for the Redeployment of Teachers
4. Compulsory Transfer Agreed Procedures (Primary)
5. Compulsory Transfer Agreed Procedures (Secondary)
6. Code of Practice on the use of Temporary Contracts
7. Acting Up Procedures-Teachers & Associated Professionals
8. F2 Appointment of Teacher to Promoted Posts
9. F8 Managing Attendance for Teachers & Associated Professionals
10. F7 Leave of Absence for Teachers & Associated Professionals
11. Working Time Arrangements
12. Employee Code of Conduct
13. Dignity at Work Policy
14. Sexual Harassment Policy
15. Equality & Diversity in Employment
16. Workforce Change Policy
17. Recruitment Charter

Heads of Establishment should engage with their HR Business Partner if advice or guidance is required on the content or application of the staffing policies listed above.

Publication

The approved DSM scheme will be publicly accessible on the North Lanarkshire website and a link will be included in school handbooks.

A leaflet will also be produced which includes the following information:

- a. A summary of the North Lanarkshire Budget
- b. A breakdown of the Education Budget
- c. A link to the full DSM scheme
- d. An overview of what budgets Heads of Establishment are responsible for
- e. Contact details to enable parents, pupils or other stakeholders to comment on the DSM scheme or to seek additional information
- f. A summary of key points in the DSM scheme
- g. Background information including the size of the estate, pupil numbers, and staffing levels

DSM Training

It is mandatory for new North Lanarkshire Heads of Establishment to attend a DSM training programme. The training will include:

- a. DSM Overview Including National Guidance & Framework Documents
- b. Managing Establishment Budgets
- c. Purchasing and Procurement
- d. HR Policies and Procedures

The mandatory training for new Heads of Establishment will be scheduled at the start of each academic year.

The Service will also prepare an annual list of DSM training opportunities and programmes which are available for other teaching and support staff. This programme will include on-line training options as well as training provided directly by Service staff and Corporate Teams.

Consultation, Engagement and Transparency

Consultation & Engagement

A DSM group will be convened to undertake the formal 3 year cyclical review of the approved scheme. This group will include the Service SMT, Heads of Establishment and representatives from other Council Services who provide advice or support to schools or nurseries. Wider engagement and briefings will also take place with stakeholders including parents and carers, pupils, trade unions and elected members.

Where appropriate, the Service will also establish short life working groups to develop and manage new initiatives or grant programmes which have an impact on the funding or resourcing of educational provision.

Through their established forums both teacher and single status trade unions will continue to be consulted on potential changes to establishment staffing or staff operating policies.

At establishment level, as at local authority level, empowerment is fundamental to decision making. Heads of Establishment should therefore engage, discuss and raise awareness of the DSM scheme with key stakeholders. To support this process each establishment will be provided with an annual budget pack which includes the following information:

- a. Establishment budget
- b. Overview of year to year budget movements
- c. A link to the approved DSM Scheme
- d. Any amendments to the DSM Scheme

Transparency

The DSM scheme will be written in plain language and clearly identify budgets which are fully devolved to Heads of Establishment.

Heads of Establishment will also be briefed on emerging school resource issues during scheduled meetings throughout the course of each year.

The Finance and Technology Service will provide Heads of Establishment with budget and staffing information on a periodic basis throughout the financial year. Standard reports will include:

- a. Budget Monitoring Reports
- b. iTrent Staffing Report
- c. Teacher Staffing Reconciliation
- d. Temporary Teachers Projections
- e. Support Staff Reconciliation
- f. PEF Plan Reconciliation
- g. Pecos Orders Report

During each financial year quarterly exception reports will be submitted to the Service Management Team. The exception reports will include:

- a. A list of establishments with a forecast overspend in excess of 1% of their aggregate DSM budget.
- b. A list of establishments with a forecast underspend in excess of 2% of their aggregate DSM budget.

Local Priorities

As outlined in The Plan for North Lanarkshire there are a number of strategies and policies which Heads of Establishment should incorporate into school and nursery improvement plans and budget plans each year.

The Council aims to ensure the right supports are in place at the right time for children and families. At an establishment level this approach is underpinned by a suite of guidance and interventions at universal, additional and intensive levels. The range of these supports reflects the [GIRFEC](#) staged intervention model allowing for levels of assistance to be stepped up or stepped down as family needs change.

[The Children's Services Plan](#) sets out the Council's vision to support all children and young people to achieve their potential, ensuring they are loved, nurtured and empowered to thrive in all aspects of their lives, upholding each and every child and young person's rights as stated in the UNCRC.

The Service has also embedded collaborative and collegiate working within the [Cluster Operating Model](#). This approach stresses the need for establishments to embrace partnership working, share resources and knowledge within the learning community, and to challenge the status quo to improve outcomes for learners.

Staffing

Staffing Structures

The Service undertakes an annual staffing exercise through which Heads of Establishment alongside HR Business Partners will play an active role in designing their school and nursery staffing model for the forthcoming academic term. The annual staffing exercise should incorporate posts resulting from core DSM budget allocations, and posts created through the use of temporary and external funding including the Pupil Equity Fund (PEF) and Teacher Induction Scheme.

Legislative and Contractual Requirements

Although staffing budgets are devolved to establishments, North Lanarkshire Council remains the legal employer of school and early years staff. Therefore, within each establishment conditions of service which have been approved nationally or locally must be adhered to. Establishments must also adhere to legislation and agreements in areas such as maximum class sizes and teacher class contact time.

Staff Resource

Heads of Establishment have the lead role in the recruitment, deployment, professional development and mentoring of school and nursery staff. Heads of Establishment will also be briefed on emerging staffing issues during scheduled meetings throughout the course of the year.

Professional Support

There are a range of officers from other Services who will assist Heads of Establishment in the daily operation of schools and nurseries. Summary information on each of these teams is provided below.

Accounting & Budgeting

Each establishment will be allocated an Administrative and Finance Assistant (AFA). The AFA will provide advice and guidance on school budgets, DSM rules and procedures, and prepare periodic finance and staffing reports.

The Finance and Technology Service will also provide specific in-year guidance on accounting matters, including year-end instructions, and staff will participate throughout the year in briefing and awareness sessions.

Technician & IT Support

Each secondary school will be allocated technician support for IT, science and workshop activity. Technicians will provide support within their area of expertise and operate as a team to address whole school issues requiring technical support. The technician team will be managed by a Senior Technician who should be the first point of contact for Field Service support, guidance and advice.

Other establishments will be supported through a peripatetic IT support model. Support should be accessed through the IT Service Desk.

The Finance and Technology Service will also provide updates and guidance throughout the year if there are any changes or amendments to the Technician or IT delivery models.

Human Resources

Each establishment will be allocated a HR Business Partner who will provide advice and guidance on staffing matters.

The HR Service will also provide specific in-year guidance and updates on staffing policies and processes.

Estate Management & Facility Support Services

The Corporate Asset Management Team will provide support and guidance to Heads of Establishment on matters including:

- a. Capital Programme & Major Works
- b. Repairs and Maintenance

Each establishment will be allocated an officer who will be their first point of contact if any building or repairs issues arise.

The Service has prepared Operating Procedures which detail the process for reporting repairs or building works and managing contractors. Heads of Establishment must follow the guidance outlined in the Operating Procedures.

The Facility Support Team will provide the following services to establishments:

- a. Building Cleaning
- b. Janitorial
- c. Catering

- d. School Crossing Patrol
- e. Community Lets
- f. Nutrition & Diet Advice

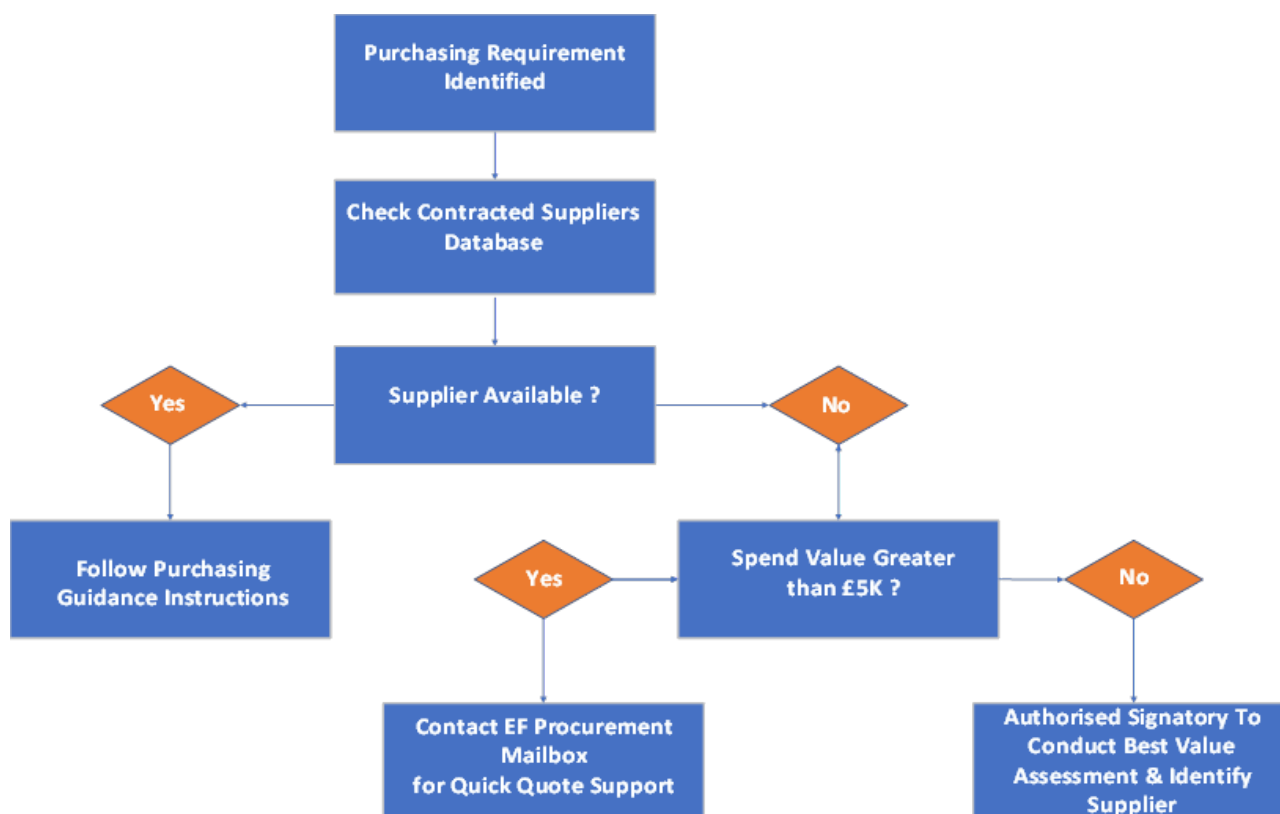
Each establishment will be allocated a named officer who will be their first point of contact to seek advice or raise any facility support issues.

Purchasing & Procurement

The Council has an approved Procurement Strategy which is underpinned by a set of General Contract Standing Orders. These documents can be accessed via the following link [Procurement Strategy & General Contract Standing Orders](#).

All procurement activity should be discharged in accordance with the General Contract Standing Orders.

In addition, the Service has prepared supplementary Procurement Guidance which has been issued to all establishments. The Procurement Guidance includes the following process chart which must be followed by establishments when purchasing goods or services.



Accounting

DSM Budget Underspend

If an establishment records an in-year underspend on their annual DSM budget allocation, a portion of this funding can be carried forward from one financial year to the next.

The maximum carry forward is 2% of the aggregate DSM annual budget which is allocated at the start of each financial year.

Heads of Establishment should ensure DSM resources carried forward from one financial year to the next are included in the establishment budget plan for the succeeding financial year.

DSM Budget Overspend

If an establishment records an in-year overspend on their annual DSM budget allocation, the full overspend value will be carried forward and applied to the establishment DSM budget for the succeeding financial year.

If the in-year overspend is in excess of 1% of the aggregate establishment DSM budget, the Head of Establishment must also submit a financial plan to the Service Senior Management Team for the succeeding financial year which explains how the establishment will return to a balanced budget position.

Virement

Schools

During each financial year schools have the authority to vire funds between individual DSM budgets subject to the following rules and limits:

Teacher Staffing Budget: Up to a maximum cash value equivalent to 0.5fte of the cost of an unpromoted teacher.

Other DSM Budget Lines: Up to a maximum value of £20,000 from each budget.

Early Years

During each financial year early years settings have the authority to vire funds between individual DSM budgets subject to the following rules and limits:

Target Operating Mode (Early Years Staff): No virements are permitted.

Other DSM budgets: Up to a maximum value of £20,000 from other DSM budget categories.

Exceptional Circumstances

The accounting and budget rules applied to individual establishments can be amended on a temporary basis following the written agreement of either the Chief Officer (Education North) or Chief Officer (Education South), plus the authority Section 95 Officer.

Scheme Review

The Service will undertake a further formal review of the approved DSM scheme within a maximum 3 year timeframe. This review will incorporate the prevailing national DSM guidance, a comparison of other authority DSM schemes, and include input from stakeholders and other staff groups from across the Council who contribute to the delivery of educational provision.

Prior to the next formal review, the Service will also prepare updates to the DSM scheme if there are significant national or local changes to education provision or delivery models.

Proposed updates to the DSM scheme will be submitted to the appropriate Council committee for approval.

Changes to school or nursery funding which are approved as part of the Councils annual budget setting process will be applied automatically to the DSM rules and allocation models.

Early Years Allocations

Early Years Staff Allocations

NLC has developed general principles in relation to the staffing entitlement within Early Years establishments that incorporates the Care Inspectorate age related staff to child ratios and a management structure for each type of establishment. NLC currently operates the following types of Early Years establishments:

- Nursery Classes - Full Time
- Nursery Classes - Term Time
- Family Learning Centres - Full Time

Table 1 – Early Years Staff to Child Ratios

Age of Children	Staff to Child Ratio
0 – 2 years	1 to 3
2 – 3 years	1 to 5
3 – 5 years	1 to 8

The calculation of staffing entitlement will be based on the actual pupil roll of each establishment.

The management structure for each nursery class and Family Learning Centre will be as outlined in the approved Target Operating Model.

The clerical allocation to Family Learning Centres will be as outlined in the approved Target Operating Model.

The Service will also manage and allocate Learning Assistants to nurseries from a centrally held Learning Assistant budget.

Early Years Operational Allocations

Early Years establishments also receive funding for non-staff (operational) budgets as highlighted in Tables 2 and 3 below.

Table 2 - Early Years Operational Budgets – Full-time Nursery Classes and Family Learning Centres

Description	Fixed Element	Variable Element
Health & Safety	£366	£0.005 x 2400 hours x Establishment Capacity
Car Allowance Mileage	£400	£25.00 x Staffing FTE
Staff Training	£300	£25.00 x Staffing FTE
Janitorial Supplies	£0	£0.005 x 2400 hours x Establishment Capacity
Medical Equipment	£0	£0.002 x 2400 hours x Establishment Capacity
Furniture & Fittings	£0	£10.00 x Establishment Capacity x 2
Materials & Equipment	£0	£0.01 x 2400 hours x Establishment Capacity
Printing & Stationery	£0	£0.0033 x 2400 hours x Establishment Capacity
Postages	£0	£0.001 x 2400 hours x Establishment Capacity

Table 3 – Early Years Operational Budgets – Term-time Nursery Classes

Description	Fixed	Variable
Health & Safety	£290	£0.005 x 1140 hours x Establishment Capacity
Car Allowance Mileage	£400	£25.00 x Staffing FTE
Staff Training	£300	£25.00 x Staffing FTE
Janitorial Supplies	£0	£0.005 x 1140 hours x Establishment Capacity
Medical Equipment	£0	£0.002 x 1140 hours x Establishment Capacity x 2
Furniture & Fittings	£0	£10.00 x Establishment Capacity
Materials & Equipment	£0	£0.01 x 1140 hours x Establishment Capacity
Printing & Stationery	£0	£0.0033 x 1140 hours x Establishment Capacity
Postages	£0	£0.001 x 1140 hours x Establishment Capacity

Primary School Allocations

Primary Schools Promoted Structure

NLC has an agreed promoted staff structure for Primary schools, as outlined in Management Circular F20, and is summarised below.

Table 4 – Primary Promoted Structure

Total Roll (Primary + ASN Unit + Nursery Class)	Structure
Up to 199 pupils	Head Teacher + 1 x Principal Teacher
200 – 299 pupils	Head Teacher + 2 x Principal Teacher
300 – 399 pupils	Head Teacher + 1 x Depute Head Teacher + 1 x Principal Teacher
400 – 499 pupils	Head Teacher + 1 x Depute Head Teacher + 2 x Principal Teacher
500 – 599 pupils	Head Teacher + 1 x Depute Head Teacher + 3 x Principal Teacher
Over 600 pupils	Head Teacher + 2 x Depute Head Teacher + 2 x Principal Teacher

Primary Schools Teaching and Support Staff Allocations

The allocation of budgets to primary schools for Teaching staff and Support staff are determined by agreed formulas per the tables below. The allocation of these staff budgets takes cognisance of primary schools that also have a nursery class and/or ASN unit within the campus.

Table 5 – Primary Teaching Staff Budgets

Description	Teaching Staff Formula
Primary Unpromoted Teacher	Unpromoted Teacher FTE for mainstream primary classes is determined per attached Primary Staffing Tables (Mainstream)
Primary Teacher Allocation for ASN Unit ⁽¹⁾	Unpromoted Teacher to pupil ratio of 1:6 x ASN Unit roll + 1 FTE Promoted Post
Primary Non-Class Contact Time ⁽²⁾	Primary ASN Unit) x 0.11 FTE
Primary Management Time ⁽²⁾	(Primary Mainstream roll + Nursery Class roll + Primary ASN Unit roll) x 0.0022 + 1 FTE Unpromoted Teacher
Deprivation	Total resource of 38.21 FTE Unpromoted Teacher allocated on SIMD data.

(1) Applies to Primaries with an ASN Unit

(2) ASN Unit roll where applicable

Table 6 – Primary Support Staff Budgets

Grade	Description	Support Staff Formula
NLC4	Senior Clerical Assistant (up to 449 pupils)	35 hours (1 FTE)
NLC5	Senior Clerical Assistant (450 pupils and over)	35 hours (1 FTE)
NLC3	Clerical Assistant ⁽²⁾	Fixed 25 hours + ((Primary roll + Nursery Class roll + Primary ASN Unit roll) x 0.12 hours) less Senior Clerical allocation
NLC4	Learning Assistant (Term-Time) ⁽³⁾	1FTE - Fixed 25 hours per establishment
NL4	Learning Assistant Primary Units (Term-Time)	1:6 ratio based on pupil roll x 1FTE post (25 hours). Part FTE will be rounded up to a full FTE.
NLC2	Dining Room Assistant (up to 300 pupils)	7.5 hours
NLC2	Dining Room Assistant (301 to 400 pupils)	10 hours
NLC2	Dining Room Assistant (over 400 pupils)	12.5 hours
NLC2	Breakfast Club Supervisor	5 hours per Campus

(2) Calculation includes Nursery Class roll and/or ASN Unit roll where applicable

(3) The Service will also manage and allocate Learning Assistants to primary schools from a centrally held Learning Assistant budget.

Primary Schools Operational Allocations

In addition to staff budgets primary schools also receive funding for non-staff (operational) budgets that are again determined by agreed formulas.

Table 7 – Primary Mainstream Operational Budgets

Description	Fixed	Variable
Teachers Absence Cover ⁽⁴⁾	£1,051.55	£307.83 x Teaching staff FTE or minimum total allocation of 14 days at average daily rate
Cover PRD	£525.78	£89.87 x Teaching staff FTE
Teachers In-Service courses	£715	£44.48 x Teaching Staff FTE
Car Allowance Mileage- Casual User	£698.66	£69.83 x Teaching Staff FTE
Support Staff Other Pay Items	£302	£1.11 x Primary roll
Early Intervention	£300	£2.00 x Primary roll
Parent Council	£478	£0.23 x Primary roll
Janitorial Supplies ⁽⁵⁾	£100	£1.00 x Primary roll
Printing & Stationery	£60.02	£1.50 x Primary roll
Postages	£110.25	£0.80 x Primary roll
Classroom Supplies	£1,240	£24.07 x Primary roll
Text books school library	£126.07	£0
Education Journals/Directories	£63.55	£0
Other supplies & services	£192	£0
Memberships Fees & subscriptions	£42.02	£0
Health & Safety	£366	£0
Furniture & Fittings	£354.65	£0
School Lets ⁽⁶⁾	£638	£0

(4) Fixed and Variable elements will be adjusted to ensure each establishment has budget to cover approved minimum cover days

(5) PPP schools do not receive a direct allocation.

Where a primary school also incorporates an ASN unit additional operational budget allocations are provided per the agreed formulas below:

Table 8 – Primary ASN Unit Operational Budgets

Description	Fixed	Variable
Teachers Absence Cover ⁽⁴⁾	£0	£533.00 x ASN Unit Teaching staff FTE
Cover PRD	£0	£246.35 x ASN Unit Teaching staff FTE
Teachers In-Service courses	£0	£116.00 x ASN Unit Teaching staff FTE
Car Allowance Mileage- Casual User	£0	£69.87 x ASN Unit Teaching staff FTE
Support Staff Other Pay Items	£0	£1.11 x ASN Unit roll
Early Intervention	£0	£3.53 x ASN Unit roll
Janitorial Supplies	£0	£1.94 x ASN Unit roll
Printing & Stationery	£0	£1.81 x ASN Unit roll
Postages	£0	£0.80 x ASN Unit roll
Classroom Supplies	£0	£51.62 x ASN Unit roll
Text books school library	£0	£1.24 x ASN Unit roll
Furniture & Fittings	£0	£0.84 x ASN Unit roll

(4) Fixed and Variable elements will be adjusted to ensure each establishment has budget to cover approved minimum cover days

Primary School Staffing Tables (Mainstream)

Table 1					
Primary Pupil Roll between 1 and 149 pupils					
P1 - P7		P1 - P7		P1 - P7	
Roll	FTE	Roll	FTE	Roll	FTE
1	1.3000	51	3.3333	101	5.5556
2	1.3000	52	3.3333	102	5.5556
3	1.3000	53	3.3333	103	5.5556
4	1.3000	54	3.3333	104	5.5556
5	1.3000	55	3.3333	105	5.5556
6	1.3000	56	3.3333	106	5.5556
7	1.3000	57	3.3333	107	5.5556
8	1.3000	58	3.3333	108	5.5556
9	1.3000	59	3.3333	109	5.5556
10	1.3000	60	3.3333	110	5.5556
11	1.3000	61	3.3333	111	5.5556
12	1.3000	62	3.3333	112	5.5636
13	1.3000	63	3.3573	113	5.6036
14	1.3000	64	3.3973	114	5.6436
15	1.3000	65	3.4373	115	5.6836
16	1.3000	66	3.4773	116	5.7236
17	1.3000	67	3.5173	117	5.7636
18	1.3000	68	3.5573	118	5.8036
19	1.3000	69	3.5973	119	5.8436
20	1.3000	70	3.6373	120	5.8836
21	1.3000	71	3.6773	121	5.9236
22	1.3000	72	3.7173	122	5.9636
23	1.3000	73	3.7573	123	6.0036
24	1.5511	74	3.7973	124	6.0436
25	1.5911	75	3.8373	125	6.6667
26	2.2222	76	4.4444	126	6.6667
27	2.2222	77	4.4444	127	6.6667
28	2.2222	78	4.4444	128	6.6667
29	2.2222	79	4.4444	129	6.6667
30	2.2222	80	4.4444	130	6.6667
31	2.2222	81	4.4444	131	6.6667
32	2.2222	82	4.4444	132	6.6667
33	2.2222	83	4.4444	133	6.6667
34	2.2222	84	4.4444	134	6.6667
35	2.2222	85	4.4444	135	6.6667
36	2.2222	86	4.4444	136	6.6667
37	2.2222	87	4.4444	137	6.6867
38	2.2342	88	4.4804	138	6.7267
39	2.2742	89	4.5204	139	6.7667
40	2.3142	90	4.5604	140	6.8067
41	2.3542	91	4.6004	141	6.8467
42	2.3942	92	4.6404	142	6.8867
43	2.4342	93	4.6804	143	6.9267
44	2.4742	94	4.7204	144	6.9667
45	2.5142	95	4.7604	145	7.0067
46	2.5542	96	4.8004	146	7.0467
47	2.5942	97	4.8404	147	7.0867
48	2.6342	98	4.8804	148	7.1267
49	2.6742	99	4.9204	149	7.1667
50	2.7142	100	5.5556		

Primary School Staffing Tables (Mainstream)

Table 2a - Primary 1 to Primary 3 FTE Allocation							
Total Primary Pupil Roll 150 pupils and over							
P1 - P3		P1 - P3		P1 - P3		P1 - P3	
Roll	FTE	Roll	FTE	Roll	FTE	Roll	FTE
1	1.1111	51	3.3333	101	5.5556	151	7.7778
2	1.1111	52	3.3333	102	5.5556	152	7.7778
3	1.1111	53	3.3333	103	5.5556	153	7.7778
4	1.1111	54	3.3333	104	5.5556	154	7.7778
5	1.1111	55	3.3333	105	5.5556	155	7.7778
6	1.1111	56	3.3333	106	5.5556	156	7.7778
7	1.1111	57	3.3333	107	5.5556	157	7.7778
8	1.1111	58	3.3333	108	5.5556	158	7.7778
9	1.1111	59	3.3333	109	5.5556	159	7.7778
10	1.1111	60	3.3333	110	5.5556	160	7.7778
11	1.1111	61	3.3333	111	5.5556	161	7.7938
12	1.1111	62	3.3333	112	5.5796	162	7.8338
13	1.1111	63	3.3653	113	5.6196	163	7.8738
14	1.1511	64	3.4053	114	5.6596	164	7.9138
15	1.1911	65	3.4453	115	5.6996	165	7.9538
16	1.2311	66	3.4853	116	5.7396	166	7.9938
17	1.2711	67	3.5253	117	5.7796	167	8.0338
18	1.3111	68	3.5653	118	5.8196	168	8.0738
19	1.3511	69	3.6053	119	5.8596	169	8.1138
20	1.3911	70	3.6453	120	5.8996	170	8.1538
21	1.4311	71	3.6853	121	5.9396	171	8.1938
22	1.4711	72	3.7253	122	5.9796	172	8.2338
23	1.5111	73	3.7653	123	6.0196	173	8.2738
24	1.5511	74	3.8053	124	6.6667	174	8.8889
25	1.5911	75	4.4444	125	6.6667	175	8.8889
26	2.2222	76	4.4444	126	6.6667	176	8.8889
27	2.2222	77	4.4444	127	6.6667	177	8.8889
28	2.2222	78	4.4444	128	6.6667	178	8.8889
29	2.2222	79	4.4444	129	6.6667	179	8.8889
30	2.2222	80	4.4444	130	6.6667	180	8.8889
31	2.2222	81	4.4444	131	6.6667	181	8.8889
32	2.2222	82	4.4444	132	6.6667	182	8.8889
33	2.2222	83	4.4444	133	6.6667	183	8.8889
34	2.2222	84	4.4444	134	6.6667	184	8.8889
35	2.2222	85	4.4444	135	6.6667	185	8.8889
36	2.2222	86	4.4444	136	6.6667	186	8.9209
37	2.2222	87	4.4524	137	6.7067	187	8.9609
38	2.2382	88	4.4924	138	6.7467	188	9.0009
39	2.2782	89	4.5324	139	6.7867	189	9.0409
40	2.3182	90	4.5724	140	6.8267	190	9.0809
41	2.3582	91	4.6124	141	6.8667	191	9.1209
42	2.3982	92	4.6524	142	6.9067	192	9.1609
43	2.4382	93	4.6924	143	6.9467	193	9.2009
44	2.4782	94	4.7324	144	6.9867	194	9.2409
45	2.5182	95	4.7724	145	7.0267	195	9.2809
46	2.5582	96	4.8124	146	7.0667	196	9.3209
47	2.5982	97	4.8524	147	7.1067	197	9.3609
48	2.6382	98	4.8924	148	7.1467	198	10.0000
49	2.6782	99	4.9324	149	7.7778	199	10.0000
50	2.7182	100	5.5556	150	7.7778	200	10.0000

Primary School Staffing Tables (Mainstream)

Table 2a - Primary 1 to Primary 3 FTE Allocation

Total Primary Pupil Roll 150 pupils and over

P1 - P3		P1 - P3		P1 - P3		P1 - P3	
Roll	FTE	Roll	FTE	Roll	FTE	Roll	FTE
201	10.0000	251	12.2222	301	14.4444	351	16.6667
202	10.0000	252	12.2222	302	14.4444	352	16.6667
203	10.0000	253	12.2222	303	14.4444	353	16.6667
204	10.0000	254	12.2222	304	14.4444	354	16.6667
205	10.0000	255	12.2222	305	14.4444	355	16.6667
206	10.0000	256	12.2222	306	14.4444	356	16.6667
207	10.0000	257	12.2222	307	14.4444	357	16.6667
208	10.0000	258	12.2222	308	14.4444	358	16.6907
209	10.0000	259	12.2222	309	14.4764	359	16.7307
210	10.0080	260	12.2622	310	14.5164	360	16.7707
211	10.0480	261	12.3022	311	14.5564	361	16.8107
212	10.0880	262	12.3422	312	14.5964	362	16.8507
213	10.1280	263	12.3822	313	14.6364	363	16.8907
214	10.1680	264	12.4222	314	14.6764	364	16.9307
215	10.2080	265	12.4622	315	14.7164	365	16.9707
216	10.2480	266	12.5022	316	14.7564	366	17.0107
217	10.2880	267	12.5422	317	14.7964	367	17.0507
218	10.3280	268	12.5822	318	14.8364	368	17.0907
219	10.3680	269	12.6222	319	14.8764	369	17.1307
220	10.4080	270	12.6622	320	14.9164	370	17.1707
221	10.4480	271	12.7022	321	15.5556	371	17.1778
222	10.4880	272	13.3333	322	15.5556	372	17.1778
223	11.1111	273	13.3333	323	15.5556	373	17.1778
224	11.1111	274	13.3333	324	15.5556	374	17.1778
225	11.1111	275	13.3333	325	15.5556	375	17.1778
226	11.1111	276	13.3333	326	15.5556	376	17.1778
227	11.1111	277	13.3333	327	15.5556	377	17.1778
228	11.1111	278	13.3333	328	15.5556	378	17.1778
229	11.1111	279	13.3333	329	15.5556	379	17.1778
230	11.1111	280	13.3333	330	15.5556	380	17.1778
231	11.1111	281	13.3333	331	15.5556	381	17.1778
232	11.1111	282	13.3333	332	15.5556	382	17.1778
233	11.1111	283	13.3333	333	15.5636	383	17.8178
234	11.1111	284	13.3493	334	15.6036	384	17.8578
235	11.1351	285	13.3893	335	15.6436	385	17.8978
236	11.1751	286	13.4293	336	15.6836	386	17.9378
237	11.2151	287	13.4693	337	15.7236	387	17.9778
238	11.2551	288	13.5093	338	15.7636	388	18.0178
239	11.2951	289	13.5493	339	15.8036	389	18.0578
240	11.3351	290	13.5893	340	15.8436	390	18.0978
241	11.3751	291	13.6293	341	15.8836	391	18.1378
242	11.4151	292	13.6693	342	15.9236	392	18.1778
243	11.4551	293	13.7093	343	15.9636	393	18.2178
244	11.4951	294	13.7493	344	16.0036	394	18.2578
245	11.5351	295	13.7893	345	16.0436	395	18.8889
246	11.5751	296	13.8293	346	16.6667	396	18.8889
247	12.2222	297	14.4444	347	16.6667	397	18.8889
248	12.2222	298	14.4444	348	16.6667	398	18.8889
249	12.2222	299	14.4444	349	16.6667	399	18.8889
250	12.2222	300	14.4444	350	16.6667	400	18.8889

Primary School Staffing Tables (Mainstream)

Table 2a - Primary 1 to Primary 3 FTE Allocation			
Total Primary Pupil Roll 150 pupils and over			
P1 - P3		P1 - P3	
Roll	FTE	Roll	FTE
401	18.8889	451	21.1111
402	18.8889	452	21.1111
403	18.8889	453	21.1111
404	18.8889	454	21.1111
405	18.8889	455	21.1111
406	18.8889	456	21.1191
407	18.9049	457	21.1591
408	18.9449	458	21.1991
409	18.9849	459	21.2391
410	19.0249	460	21.2791
411	19.0649	461	21.3191
412	19.1049	462	21.3591
413	19.1449	463	21.3991
414	19.1849	464	21.4391
415	19.2249	465	21.4791
416	19.2649		
417	19.3049		
418	19.3449		
419	19.3849		
420	20.0000		
421	20.0000		
422	20.0000		
423	20.0000		
424	20.0000		
425	20.0000		
426	20.0000		
427	20.0000		
428	20.0000		
429	20.0000		
430	20.0000		
431	20.0000		
432	20.0320		
433	20.0720		
434	20.1120		
435	20.1520		
436	20.1920		
437	20.2320		
438	20.2720		
439	20.3120		
440	20.3520		
441	20.3920		
442	20.4320		
443	20.4720		
444	21.1111		
445	21.1111		
446	21.1111		
447	21.1111		
448	21.1111		
449	21.1111		
450	21.1111		

Primary School Staffing Tables (Mainstream)
Table 2b - Primary 4 to Primary 7 FTE Allocation
Total Primary Pupil Roll 150 pupils and over

P4 - P7		P4 - P7		P4 - P7		P4 - P7	
Roll	FTE	Roll	FTE	Roll	FTE	Roll	FTE
1	0.0428	51	2.1817	101	4.3206	151	5.9628
2	0.0856	52	2.2244	102	4.3633	152	6.0023
3	0.1283	53	2.2672	103	4.4061	153	6.0418
4	0.1711	54	2.3100	104	4.4489	154	6.0813
5	0.2139	55	2.3528	105	4.4917	155	6.1208
6	0.2567	56	2.3956	106	4.5344	156	6.1603
7	0.2994	57	2.4383	107	4.5772	157	6.1998
8	0.3422	58	2.4811	108	4.6200	158	6.2392
9	0.3850	59	2.5239	109	4.6628	159	6.2787
10	0.4278	60	2.5667	110	4.7056	160	6.3182
11	0.4706	61	2.6094	111	4.7483	161	6.3577
12	0.5133	62	2.6522	112	4.7911	162	6.3972
13	0.5561	63	2.6950	113	4.8339	163	6.4367
14	0.5989	64	2.7378	114	4.8767	164	6.4762
15	0.6417	65	2.7806	115	4.9194	165	6.5157
16	0.6844	66	2.8233	116	4.9622	166	6.5552
17	0.7272	67	2.8661	117	5.0050	167	6.5946
18	0.7700	68	2.9089	118	5.0478	168	6.6341
19	0.8128	69	2.9517	119	5.0906	169	6.6736
20	0.8556	70	2.9944	120	5.1183	170	6.7131
21	0.8983	71	3.0372	121	5.1461	171	6.7526
22	0.9411	72	3.0800	122	5.1739	172	6.7921
23	0.9839	73	3.1228	123	5.2017	173	6.8316
24	1.0267	74	3.1656	124	5.2294	174	6.8711
25	1.0694	75	3.2083	125	5.2572	175	6.9106
26	1.1122	76	3.2511	126	5.2850	176	6.9500
27	1.1550	77	3.2939	127	5.3128	177	6.9895
28	1.1978	78	3.3367	128	5.3406	178	7.0290
29	1.2406	79	3.3794	129	5.3683	179	7.0685
30	1.2833	80	3.4222	130	5.3961	180	7.1080
31	1.3261	81	3.4650	131	5.4239	181	7.1475
32	1.3689	82	3.5078	132	5.4517	182	7.1870
33	1.4117	83	3.5506	133	5.4794	183	7.2265
34	1.4544	84	3.5933	134	5.5072	184	7.2660
35	1.4972	85	3.6361	135	5.5350	185	7.3054
36	1.5400	86	3.6789	136	5.5628	186	7.3449
37	1.5828	87	3.7217	137	5.5906	187	7.3844
38	1.6256	88	3.7644	138	5.6183	188	7.4239
39	1.6683	89	3.8072	139	5.6461	189	7.4634
40	1.7111	90	3.8500	140	5.6739	190	7.5029
41	1.7539	91	3.8928	141	5.7017	191	7.5424
42	1.7967	92	3.9356	142	5.7294	192	7.5819
43	1.8394	93	3.9783	143	5.7572	193	7.6214
44	1.8822	94	4.0211	144	5.7850	194	7.6608
45	1.9250	95	4.0639	145	5.8128	195	7.7003
46	1.9678	96	4.1067	146	5.8406	196	7.7398
47	2.0106	97	4.1494	147	5.8683	197	7.7793
48	2.0533	98	4.1922	148	5.8961	198	7.8188
49	2.0961	99	4.2350	149	5.9239	199	7.8583
50	2.1389	100	4.2778	150	5.9517	200	7.8978

Primary School Staffing Tables (Mainstream)
Table 2b - Primary 4 to Primary 7 FTE Allocation
Total Primary Pupil Roll 150 pupils and over

P4 - P7		P4 - P7		P4 - P7		P4 - P7	
Roll	FTE	Roll	FTE	Roll	FTE	Roll	FTE
201	7.9373	251	9.9117	301	11.8862	351	13.8606
202	7.9768	252	9.9512	302	11.9256	352	13.9001
203	8.0162	253	9.9907	303	11.9651	353	13.9396
204	8.0557	254	10.0302	304	12.0046	354	13.9791
205	8.0952	255	10.0697	305	12.0441	355	14.0186
206	8.1347	256	10.1092	306	12.0836	356	14.0580
207	8.1742	257	10.1486	307	12.1231	357	14.0975
208	8.2137	258	10.1881	308	12.1626	358	14.1370
209	8.2532	259	10.2276	309	12.2021	359	14.1765
210	8.2927	260	10.2671	310	12.2416	360	14.2160
211	8.3322	261	10.3066	311	12.2810	361	14.2555
212	8.3716	262	10.3461	312	12.3205	362	14.2950
213	8.4111	263	10.3856	313	12.3600	363	14.3345
214	8.4506	264	10.4251	314	12.3995	364	14.3740
215	8.4901	265	10.4646	315	12.4390	365	14.4134
216	8.5296	266	10.5040	316	12.4785	366	14.4529
217	8.5691	267	10.5435	317	12.5180	367	14.4924
218	8.6086	268	10.5830	318	12.5575	368	14.5319
219	8.6481	269	10.6225	319	12.5970	369	14.5714
220	8.6876	270	10.6620	320	12.6364	370	14.6109
221	8.7270	271	10.7015	321	12.6759	371	14.6504
222	8.7665	272	10.7410	322	12.7154	372	14.6899
223	8.8060	273	10.7805	323	12.7549	373	14.7294
224	8.8455	274	10.8200	324	12.7944	374	14.7688
225	8.8850	275	10.8594	325	12.8339	375	14.8083
226	8.9245	276	10.8989	326	12.8734	376	14.8478
227	8.9640	277	10.9384	327	12.9129	377	14.8873
228	9.0035	278	10.9779	328	12.9524	378	14.9268
229	9.0430	279	11.0174	329	12.9918	379	14.9663
230	9.0824	280	11.0569	330	13.0313	380	15.0058
231	9.1219	281	11.0964	331	13.0708	381	15.0453
232	9.1614	282	11.1359	332	13.1103	382	15.0848
233	9.2009	283	11.1754	333	13.1498	383	15.1242
234	9.2404	284	11.2148	334	13.1893	384	15.1637
235	9.2799	285	11.2543	335	13.2288	385	15.2032
236	9.3194	286	11.2938	336	13.2683	386	15.2427
237	9.3589	287	11.3333	337	13.3078	387	15.2822
238	9.3984	288	11.3728	338	13.3472	388	15.3217
239	9.4378	289	11.4123	339	13.3867	389	15.3612
240	9.4773	290	11.4518	340	13.4262	390	15.4007
241	9.5168	291	11.4913	341	13.4657	391	15.4402
242	9.5563	292	11.5308	342	13.5052	392	15.4796
243	9.5958	293	11.5702	343	13.5447	393	15.5191
244	9.6353	294	11.6097	344	13.5842	394	15.5586
245	9.6748	295	11.6492	345	13.6237	395	15.5981
246	9.7143	296	11.6887	346	13.6632	396	15.6376
247	9.7538	297	11.7282	347	13.7026	397	15.6771
248	9.7932	298	11.7677	348	13.7421	398	15.7166
249	9.8327	299	11.8072	349	13.7816	399	15.7561
250	9.8722	300	11.8467	350	13.8211	400	15.7956

Primary School Staffing Tables (Mainstream)

Table 2b - Primary 4 to Primary 7 FTE Allocation			
Total Primary Pupil Roll 150 pupils and over			
P4 - P7		P4 - P7	
Roll	FTE	Roll	FTE
401	15.8350	451	17.8095
402	15.8745	452	17.8490
403	15.9140	453	17.8885
404	15.9535	454	17.9280
405	15.9930	455	17.9674
406	16.0325	456	18.0069
407	16.0720	457	18.0464
408	16.1115	458	18.0859
409	16.1510	459	18.1254
410	16.1904	460	18.1649
411	16.2299	461	18.2044
412	16.2694	462	18.2439
413	16.3089	463	18.2834
414	16.3484	464	18.3228
415	16.3879	465	18.3623
416	16.4274		
417	16.4669		
418	16.5064		
419	16.5458		
420	16.5853		
421	16.6248		
422	16.6643		
423	16.7038		
424	16.7433		
425	16.7828		
426	16.8223		
427	16.8618		
428	16.9012		
429	16.9407		
430	16.9802		
431	17.0197		
432	17.0592		
433	17.0987		
434	17.1382		
435	17.1777		
436	17.2172		
437	17.2566		
438	17.2961		
439	17.3356		
440	17.3751		
441	17.4146		
442	17.4541		
443	17.4936		
444	17.5331		
445	17.5726		
446	17.6120		
447	17.6515		
448	17.6910		
449	17.7305		
450	17.7700		

Secondary Allocations

Secondary Schools Promoted Structure

Secondary schools receive an allocation of management points for their promoted staff structure. The Management Point Calculation is: 250 fixed points + (0.4164 variable x roll)

Table 1 below details the current agreed management points required for each promoted teacher post.

Table 1 – Management Points

Principal Teachers		Depute and Head Teachers					
Scale Point	Management Points	Scale Point	Management Points	Scale Point	Management Points	Scale Point	Management Points
1	11	1	24	8	50	15	91
2	15	2	27	9	53	16	100
3	19	3	31	10	57	17	109
4	23	4	35	11	63	18	119
5	27	5	39	12	69	19	128
6	31	6	42	13	75		
7	35	7	46	14	82		
8	39						

The standard management structures, informed by points allocation, are detailed in Table 2 below:

Table 2 – Standard Management Structures

Entitlement	Structure
All schools	Head Teacher
Subject to management points	Deputy Head Teacher
Subject to management points	Principal Teacher (Curricular/Whole School/Pupil Support)

Secondary Schools Teaching and Support Staff Allocations

Teaching staff and Support staff budgets allocated to secondary schools are determined by agreed formulas. The allocation of these staff budgets takes also reflects secondary schools that a ASN unit within the campus.

Table 3 – Secondary Teaching Staff Budgets

Description	Teaching Staff Formula
Secondary Mainstream Unpromoted Teacher	8.19 FTE Unpromoted Teacher + (0.0568 x Secondary Mainstream roll)
Secondary ASN Unit ⁽¹⁾	Unpromoted Teacher to pupil ratio of 1:6 x ASN Unit roll + 1 FTE Promoted Post
Secondary Management Time ⁽²⁾	1 FTE Unpromoted Teacher + (Secondary Mainstream roll + ASN Unit roll) x 0.0066
Deprivation	Total resource of 31.75 FTE Unpromoted Teacher allocated on SIMD data for each school

(1) Applies to secondaries with an ASN Unit

(2) Calculation includes ASN Unit roll where applicable

Table 4 – Secondary Support Staff Budgets (up to 950 pupils)

Grade	Description	Support Staff Formula
NLC5	Senior Clerical post (Full-Time)	35 hours (1 FTE)
NLC3	Clerical post (Full-Time)	35 hours (1 FTE)
NLC3	Clerical post (Term-Time) ⁽³⁾	Fixed 30 hours + ((Secondary roll + ASN Unit roll) x 0.145 hours) less Senior Clerical and Clerical full-time allocation
NLC4	Learning Assistant (Term-Time) ⁽⁴⁾	1FTE - Fixed 27.5 hours per establishment
NLC4	Learning Assistant Secondary Units (Term-Time)	1:6 ratio based on pupil roll x 1FTE post (27.5 hours). Part FTE will be rounded up to a full FTE.

(3) Calculation includes ASN Unit roll where applicable

(4) The Service will also manage and allocate Learning Assistants to secondary schools from a centrally held Learning Assistant budget

Table 5 – Secondary Support Staff Budgets (951 pupils and over)

Grade	Description	Support Staff Formula
NLC5	Senior Clerical post (Full-Time)	35 hours (1 FTE)
NLC3	Clerical post (Full-Time)	35 hours (2 FTE)
NLC3	Clerical post (Term-Time) ⁽³⁾	Fixed 30 hours + ((Secondary roll + ASN Unit roll) x 0.145 hours) less Senior Clerical and Clerical full-time allocation
NLC4	Learning Assistant (Term-Time) ⁽⁴⁾	1FTE - Fixed 27.5 hours per establishment
NLC4	Learning Assistant Secondary Units (Term-Time)	1:6 ratio based on pupil roll x 1FTE post (27.5 hours). Part FTE will be rounded up to a full FTE.

(3) Calculation includes ASN Unit roll where applicable

(4) The Service will also manage and allocate Learning Assistants to secondary schools from a centrally held Learning Assistant budget

Secondary Schools Operational Allocations

In addition to staff budgets secondary schools also receive funding for non-staff (operational) budgets that are again determined by agreed formulas.

Table 6 – Secondary Mainstream Operational Budgets

Description	Fixed	Variable
Teachers Absence Cover ⁽⁵⁾	£0	£233.21 x Mainstream Teachers FTE
Cover Professional Review & Development	£630.93	£169.47 x Mainstream Teachers FTE
Teachers In-Service courses	£715	£67.87 x Mainstream Teachers FTE
Car Allowance Mileage	£698.66	£69.83 x Mainstream Teachers FTE
Support Staff Other Pay Items	£1,765	£2.38 x Mainstream Secondary roll
Parent Council	£328	£0.23 x Mainstream Secondary roll
Janitorial Supplies ⁽⁶⁾	£200	£1.00 x Mainstream Secondary roll
Printing & Stationery	£182.18	£1.20 x Mainstream Secondary roll
Postages	£374.85	£1.20 x Mainstream Secondary roll
Use of PE Facilities	£0	£2.00 x Mainstream Secondary roll
Classroom Supplies (S1 and S2)	£0	£11.16 x Mainstream Secondary roll (S1 and S2 only)
Classroom Supplies	£2,454.88	£38.14 x Mainstream Secondary roll
Educational Supplies	£600	£0
Text books school library	£2,478.45	£0

Education Journals/Directories	£115.82	£0
Other Supplies & Services	£1,215	£0
Memberships Fees & subscriptions	£390.52	£0
Health & Safety	£1,117.25	£0
Furniture & Fittings	£1,577.47	£0
School Lets	£938	£0

(5) Fixed and Variable elements will be adjusted to ensure each establishment has budget to cover approved minimum cover days

(6) PPP schools do not receive a direct allocation

Where a secondary school also incorporates an ASN unit additional operational budget allocations are provided per the below agreed formulas.

Table 7 – Secondary ASN Unit Operational Budgets

Description	Fixed	Variable
Teachers Absence Cover ⁽⁵⁾	£0	£322.69 x ASN Unit Teaching staff FTE
Cover Professional Review & Development	£0	£246.35 x ASN Unit Teaching staff FTE
Teachers In-Service courses	£0	£116.00 x ASN Unit Teaching Staff FTE
Car Allowance Mileage- Casual User	£0	£69.83 x ASN Unit Teaching Staff FTE
Support Staff Other Pay Items	£0	£2.38 x ASN Unit roll
Janitorial Supplies	£0	£1.64 x ASN Unit roll
Printing & Stationery	£0	£1.81 x ASN Unit roll
Postages	£0	£1.20 x ASN Unit roll
Use of PE Facilities	£0	£3.15 x ASN Unit roll
Classroom Supplies	£0	£111.08 x ASN Unit roll
Text books school library	£0	£1.24 x ASN Unit roll
Furniture & Fittings	£0	£1.33 x ASN Unit roll

(5) Fixed and Variable elements will be adjusted to ensure each establishment has budget to cover approved minimum cover days

ASN Schools AllocationsASN Single Site School Promoted Structure

A Management time formula for ASN schools has been developed in line with Management Circular F20, and is shown below:

Table 1 – ASN Management Time Formula

Sector	Management Time Formula (FTE)
Head Teacher	1 FTE
Deputy Head Teacher	1 x Deputy Head Teacher = 1 FTE or 2 x Deputy Head Teacher = 1.5 FTE or 3 x Deputy Head Teacher = 1.8 FTE
Principal Teacher	0.1 FTE per PT
Basic Teacher	0.4 FTE Split Site Enhancement

ASN Schools Teaching and Support Staff Allocations

Within dedicated ASN schools the teaching staff and support staff allocations are initially determined by approved Teacher to pupil ratios. The current allocations are shown in the table below.

Table 2 – ASN School Classifications

Classification	Teacher to Pupil Roll Ratio
Social Emotional & Behavioural Needs	1 to 5
Severe & Complex	1 to 6
Moderate Learning Difficulties	1 to 7

The final allocation of teaching staff to ASN schools will be subject to formal agreement between the Head Teacher and Service Management Team.

Table 3 – ASN Support Staff Allocations

Grade	Description	Support Staff Formula
NLC4	Senior Clerical Assistant	35 hours (1 FTE)
NLC3	Clerical Assistant	Fixed 30 hours + (ASN roll x 0.145 hours) less Senior Clerical
NLC5	Learning Assistant (Term-Time) Social Emotional & Behavioural Needs ⁽¹⁾	1:5 ratio based on pupil roll x 1FTE post (27.5 hours). Part FTE school allocation will be rounded up to a full FTE.
NLC5	Learning Assistant (Term-Time) Severe & Complex ⁽¹⁾	1:3 ratio based on pupil roll x 1FTE post (27.5 hours). Part FTE school allocation will be rounded up to a full FTE.
NLC5	Learning Assistant (Term-Time) Moderate Learning Difficulties ⁽¹⁾	1:5 ratio based on pupil roll x 1FTE post (27.5 hours). Part FTE school allocation will be rounded up to a full FTE.

(1) The Service will also manage and allocate Learning Assistants to ASN schools from a centrally held Learning Assistant budget

ASN Schools Operational Allocations

In addition to staff budgets ASN schools also receive funding for non-staff (operational) budgets that are again determined by agreed formulas.

Table 4 - ASN Operational Budgets (Up to 49 Pupils)

Description	Fixed	Variable
Teachers Absence Cover ⁽²⁾	£0	£743.31 x Teachers FTE or minimum total allocation of 9 days at average daily rate
Cover Professional Review & Development	£525.78	£246.35 x Teachers FTE
Teachers In-Service courses	£715	£116.00 x Teachers FTE
Car Allowance Mileage- Casual User	£900	£70.00 x Teachers FTE
Support Staff Other Pay Items	£604	£2.17 x ASN roll
Parent Council	£478	£0.23 x ASN roll
Janitorial Supplies	£200	£1.94 x ASN roll
Printing & Stationery	£120	£1.10 x ASN roll
Postages	£190	£1.55 x ASN roll
Use of PE Facilities	£0	£18.00 x ASN roll
Classroom Supplies	£1,500	£31.86 x ASN roll
Text books school library	£800	£2.61 x ASN roll
Other Supplies & Services	£500	£1.45 x ASN roll
Furniture & Fittings	£850	£3.00 x ASN roll
Education Journals/Directories	£90	£0
Memberships Fees & subscriptions	£250	£0
Health & Safety	£720	£0
School Lets	£638	£0

(2) Fixed and Variable elements will be adjusted to ensure each establishment has budget to cover approved minimum cover days

Table 5 - ASN Operational Budgets (50 to 99 Pupils)

Description	Fixed	Variable
Teachers Absence Cover ⁽²⁾	£0	£743.31 x Teachers FTE
Cover Professional Review & Development	£525.78	£246.35 x Teachers FTE
Teachers In-Service courses	£715	£116.00 x Teachers FTE
Car Allowance Mileage- Casual User	£900	£70.00 x Teachers FTE
Support Staff Other Pay Items	£604	£2.17 x ASN roll
Parent Council	£478	£0.23 x ASN roll
Janitorial Supplies	£200	£1.94 x ASN roll
Printing & Stationery	£90	£1.40 x ASN roll
Postages	£150	£2.15 x ASN roll
Use of PE Facilities	£0	£9.40 x ASN roll
Classroom Supplies	£1,300	£33.72 x ASN roll
Text books school library	£650	£4.61 x ASN roll
Other Supplies & Services	£300	£3.55 x ASN roll
Furniture & Fittings	£700	£3.50 x ASN roll
Education Journals/Directories	£90	£0
Memberships Fees & subscriptions	£250	£0
Health & Safety	£720	£0
School Lets	£638	£0

(2) Fixed and Variable elements will be adjusted to ensure each establishment has budget to cover approved minimum cover days

Table 6 - ASN Operational Budgets (100 Pupils and over)

Description	Fixed	Variable
Teachers Absence Cover ⁽²⁾	£0	£743.31 x Teachers FTE
Cover Professional Review & Development	£525.78	£246.35 x Teachers FTE
Teachers In-Service courses	£715	£116.00 x Teachers FTE
Car Allowance Mileage- Casual User	£950	£70.00 x Teachers FTE
Support Staff Other Pay Items	£604	£2.17 x ASN roll
Parent Council	£478	£0.23 x ASN roll
Janitorial Supplies	£200	£1.94 x ASN roll
Printing & Stationery	£70	£1.70 x ASN roll
Postages	£100	£2.55 x ASN roll
Use of PE Facilities	£0	£6.00 x ASN roll
Classroom Supplies	£1,100	£35.55 x ASN roll
Text books school library	£400	£6.61 x ASN roll
Other Supplies & Services	£200	£4.50 x ASN roll
Furniture & Fittings	£500	£6.10 x ASN roll
Education Journals/Directories	£90	£0
Memberships Fees & subscriptions	£150	£0
Health & Safety	£720	£0
School Lets	£638	£0

(2) Fixed and Variable elements will be adjusted to ensure each establishment has budget to cover approved minimum cover days

ASN Multi-Site School Promoted Structure

The promoted structure for Multi-Site ASN schools will be as approved in Management Circular F20.

DEVOLVED SCHOOL MANAGEMENT

Guidelines



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Introduction

These guidelines have been devised to help Local Authorities¹ develop their own Devolved School Management (DSM) schemes. They include advice on what is expected and recommended in a local scheme, alongside practical examples from Local Authorities. To aid Local Authorities, a framework document has been created which will allow Local Authorities to populate a standard format if they wish to do so, introducing broader consistency of scheme presentation. This Framework can be found at <https://www.gov.scot/policies/schools/devolved-school-management/>.

This document has two main sections. The first section, ***Devolved School Management: Background and Principles*** sets out the background, context and principles of DSM, as well as providing a common framework and overview of the expectations and requirements. The second part, ***Devolved School Management: Detailed Guidance for Local Authorities in developing a DSM scheme***, provides detailed guidance for Local Authorities including regarding format and publication, scheme review, training, accounting matters, consultation, engagement and, transparency, professional support, collaboration and staffing. Throughout the second section, examples from Local Authorities are given. These are intended to offer ideas and aid discussion on areas a Local Authority may wish to include in its scheme. Finally, Appendices A to D provide supporting information.

These guidelines aim to encourage participation from Local Authority wider teams, schools² and parents. They have been prepared through collaboration and consultation with a wide range of stakeholders. Collaboration is key to a successful local DSM scheme; this is captured within the Joint Agreement and Headteachers' Charter to which these guidelines align and support.

Devolved School Management was introduced in 1993 to enhance and improve the management of resources at school level. The DSM guidance was reviewed in 2006, and again in 2012, taking account of the changing economic and financial climate for both Local Authorities and the Scottish Government. In June 2017 the Scottish Government consulted on changes to DSM as part of the wider "*Fair Funding to Achieve Excellence and Equity in Education*" consultation.

These updated DSM guidelines seek to build and improve on the DSM Guidelines of 2012 and, critically, reflect and integrate with the Education Reform Programme and priorities emerging from the Scottish Government and COSLA Education Reform Joint Agreement of June 2018.

¹ The terms "Local Authority" and "Local Authorities" are used throughout this guidance to mean the education authority, being a council constituted under section 2 of the Local Government etc. (Scotland) Act 1994.

² The terms "school" and "headteacher" are used throughout this guidance. These guidelines recognise that in relation to DSM, the functions and roles undertaken within an empowered school system are not restricted to headteachers. Although the role of headteacher is identified throughout, shared and distributed leadership means that other staff members, or groups, may undertake an area or aspect of DSM. The guidelines support distributed leadership, collaboration and consultation, whilst recognising that the accountability and responsibility will reside with the headteacher as the leader of their school, supported by the Local Authority.

The guidelines were developed through extensive stakeholder engagement (Appendix C) and produced by the Scottish Government and COSLA in conjunction with the Fair Funding Working Group and Fair Funding Reference Group (Appendix D). These guidelines are issued by Scottish Ministers under section 13 of the Standards in Scotland's Schools etc Act 2000 (the 2000 Act). This guidance is issued to Local Authorities in relation to their functions under Section 8³ of the 2000 Act in relation to delegation schemes. Before issuing this guidance, Scottish Ministers consulted those detailed in Appendix C about the proposed guidance. The guidelines are sufficiently flexible to support local variation and local circumstances, ensuring that the democratic right, aims and priorities of locally elected members remain fundamental to successful schemes.

The guidelines replace three separate documents from 2012 - Devolved School Management Guidelines, Devolved School Management Self-Evaluation Toolkit and Devolved School Management Examples of Practice from the Association of Directors of Education in Scotland (ADES) Resources Network.

³ In preparing a delegation scheme reference should be made to Section 8 of the 2000 Act which requires the Local Authority to have a delegation scheme, and provides more details on: the circumstances in which they can be applied; what they *must* contain and what they *may* contain. For example, section 8(2)(a) requires that where a delegation scheme is in place in respect of a school that scheme must delegate to the headteacher the preparation of the school improvement plan and section 8(3) requires that the scheme must require the headteacher to exercise the delegated functions in a manner consistent with the Local Authority's duties to secure improvement in the quality of school education which is provided in the school management by them and with a view to raising standards of education.

1. Devolved School Management: Background and Principles

1.1 Education Reform Joint Agreement 2018

In June 2018, the Joint Agreement between the Scottish Government and COSLA established the principles that:

- Effective system-wide improvement requires strong leadership, collaborative working and clarity of purpose at all layers of the system – school, local, regional and national.
- Headteachers are the leaders of learning and teaching in their school. They are senior officers of the Local Authority and have operational responsibility for the service they provide, therefore the majority of decisions should be made at school level.
- Schools are empowered to make the decisions that most affect their children and young people's outcomes, while being part of a collaborative learning community, the Local Authority and working with others.
- Empowered schools require both strong and distributive leadership, working in partnership with pupils, parents, staff and the wider community.
- The principle of headteacher empowerment will be applied consistently across Scotland.
- Local Authorities' duty to provide education for children and young people means that they must be able to intervene in decisions made by headteachers where statutory, financial, or contractual obligations would be breached.
- Local Authorities and their headteachers should have a mutually respectful and supportive relationship, with clear processes in place to minimise the need for such intervention.
- Decisions by all parties should reflect mutually supportive and respectful relationships.

The Joint Agreement advises that through the Headteachers' Charter, Local Authorities are to empower headteachers in areas of curriculum, improvement, staffing and funding. Regarding **funding**, it defines this further:

- Local Authorities will continue to be responsible for the Local Authority education budget and the delegation of funding to schools. Headteachers will make decisions on the spending within that delegated budget.
- Decisions about education spending at Local Authority and school level are made in a collegiate and transparent way paying due regard to Getting It Right for Every Child (GIRFEC) and Local Authorities' role as Corporate Parents.

- Local Authorities have regard to updated statutory guidance setting out a clear national framework for the delegation of funding to schools. This guidance is being co-produced through the Fair Funding Reference Group.

The Fair Funding Reference Group formed the Fair Funding Working Group to provide the detailed and practical insight necessary to deliver this guidance.

1.2 Aims of Empowerment of Funding

An empowered system is built on mutual trust, cooperation, transparency and highly effective communication. In an empowered system, headteachers, schools and their Local Authorities are partners, each contributing and supporting each other and respecting the different role each plays.

Local Authorities add value by enabling key decisions to be made by those who are closest to the educational experience of children and young people and who best understand the particular context of the learning community. Decision making about funding that affects the school should sit, therefore, at school level unless there is a compelling reason for this not to be the case. The headteacher is accountable and responsible for decisions that should be made in consultation with pupils, parents, staff and the wider community.

In an empowered school, decisions are based on local circumstances, delivering the highest impact on the learning experience of children and young people, and achieving the best outcomes for learners. Empowered schools require both strong and distributive leadership, again working in partnership with pupils, parents, staff and the wider community. An empowered school should have established systems and mechanisms which ensure that decisions are made in collaboration with stakeholders and which lead to better outcomes for children and young people.

Headteachers are expected to be able to manage a fair, equitable and transparent devolved budget that meets the needs and priorities of the school and local community. As senior officers of the Local Authority, responsible for the leadership and management of the service provided to children and young people and their families, headteachers are accountable to both their employer and to their learning community for the leadership and management of education and resources within their settings.

Headteachers, whilst being part of a collaborative community, the Local Authority and working with others, are accountable for the resources within their delegated budget responsibility.

These guidelines recognise that in relation to DSM the functions and roles undertaken within an empowered school system are not restricted to headteachers. Although the role of headteacher is identified throughout, shared and distributed leadership means that other staff members or groups may undertake an area or aspect of DSM. An empowered school system means that all teachers are empowered and have meaningful input to decisions about school funding. The guidelines support distributed leadership, collaboration and consultation whilst

recognising that ultimately the accountability and responsibility will reside with the headteacher as the leader of their school, supported by the Local Authority.

1.3 A Headteachers' Charter for School Empowerment

The Headteachers' Charter advises that in an empowered system, headteachers should lead learning communities to determine the most appropriate approach in the areas of leading learning and teaching, empowering the learning community and making best use of the school's resources.

In relation to making **best use of the school's resources**, headteachers are required to:

- Manage a delegated budget in a fair, equitable and transparent way, supported by the Local Authority and a fair, transparent and equitable local Devolved School Management Scheme.
- Deploy the school's budget in accordance with best value principles and Local Authority procurement arrangements, with appropriate support and guidance from their Local Authority.
- Play an active role in designing and reviewing recruitment and staffing approaches, both for their own school(s) and for the wider Authority.
- Be empowered to design a staffing structure which best supports the school's curriculum and leadership requirements, working within their delegated staffing budget and supported by their Local Authority and Scottish Negotiating Committee for Teachers (SNCT) / Local Negotiating Committee for Teachers (LNCT) agreements and guidance.
- Be integral to the appointment of staff in accordance with the best interests of children and young people, and work in partnership with the Local Authority to ensure good practice in recruitment and appointments, in line with SNCT/LNCT agreements and guidance.
- Work in partnership with the Local Authority, and within clearly defined roles, responsibilities and accountabilities, to ensure a highly professional school team is built and sustained to meet the needs of the learning community.

1.4 The Principles for Devolved School Management

The updated DSM principles, agreed by the Fair Funding Reference Group and building on and enhancing the foundations and principles of the 2012 guidance, are:

- Subsidiarity and Empowerment.
- Collaboration.
- Accountability and Responsibility.
- Clarity and Equity.

These principles reflect the National Improvement Framework aims of excellence through raising attainment and achieving equity. The principles also fully endorse those proposed in the Fair Funding consultation:

- support excellence and equity - ensuring every child and young person has the same opportunity to succeed
- be fair - placing the needs of all children and young people at the centre
- be simple, transparent and predictable – ensuring the costs of delivering education can be easily understood and explained and that schools are able to manage and plan ahead with certainty
- deliver value for money – ensuring that every penny spent is used effectively

Subsidiarity and Empowerment

DSM must provide headteachers and schools with the autonomy and flexibility to ensure decisions are made at the most appropriate level. Local Authorities should, within their DSM scheme, provide headteachers with clear information about which areas of expenditure are delegated to them. Whilst headteachers should have flexibility in the budgets required to operate and administer a school, there are also areas of expenditure that are not generally considered suitable for devolution to schools. Further guidance is provided in Appendix B. Devolution of budget must be supportive to the headteacher and allow a headteacher to make a positive impact on outcomes for children and young people, and must suit local context.

Delegation: Decisions are made closest to the learner wherever possible and should be delegated to headteachers and schools in line with the Education Reform programme. Schools are empowered to make the decisions that affect outcomes, while being part of a collaborative learning community and the Local Authority. Decisions about education spending at Local Authority and school level are made in a collegiate and transparent way, paying due regard to wider responsibilities including GIRFEC.

Staffing: headteachers are involved in the design of recruitment processes and can design a staffing structure that best supports learning and teaching in the school, within the budget delegated to the school by the Local Authority. Headteachers must comply with employment law and other relevant legislation, and the contractual obligations and policies of their Local Authority. Local Authorities and headteachers must have regard to supporting guidance and agreements developed by SNCT and LNCT (where appropriate).

Budget: The majority of budget decisions should be made at school level. Local Authority schemes should detail specific guidance for accounting policies with regard to areas such as budget setting, budget virement and carry forward of budget underspends based on locally determined criteria.

Collaboration

All partners must work together in a collegiate and collaborative way, keeping the interests of children and young people front and centre.

Consultation: DSM should be designed and implemented in collaboration and consultation with stakeholders. Joint working with partners should be guided by, and support, the School Improvement Plan, Local Authority or education service, other plans, and local and national priorities.

Partnership: In an empowered system, Local Authorities, headteachers and other school staff should work collaboratively at a local, regional and national level. headteachers furthermore should ensure that the systems are in place to allow collaboration with their school community, so that decisions are taken through the principles of co-production.

Combined budgets and integrated services: Local Authority schemes should provide scope for combining budgets between schools, clusters, and other public partners (subject to any legal or contractual restraints), noting the requirements of Local Authority policies and frameworks, including, although not limited to: procurement, finance, and recruitment.

Accountability and Responsibility

Accountability is required at all levels; with the Local Authority, headteachers and delegated budget holders all being accountable and responsible within an empowered DSM scheme.

Accountability: Headteachers are the leaders of learning and teaching in their school and are senior officers of the Local Authority with operational responsibility for the service they provide. Local Authorities will continue to be democratically accountable for the Local Authority education budget and the delegation of funding to schools, while headteachers in collaboration with stakeholders will make decisions on the spending within that delegated budget. As senior officers of the Local Authority, headteachers are accountable to both their employer and to their learning community for the leadership and management of education and resources within their setting.

Quality Assurance and Review: Local Authorities should review DSM schemes every three years through peer review; in consultation and collaboration with stakeholders. Quality assurance should be built into the scheme and should particularly consider best practice from other Local Authorities. Local Authorities should also consider, as part of their ongoing self-evaluation, updating DSM schemes if relevant changes occur, for example following annual budget setting.

Support: Local Authorities should ensure that appropriate professional support functions such as business management, finance, human resources teams and administrative support are in place to provide both support and challenge to headteachers exercising their delegated duties.

Clarity and Equity

Clarity and equity is required at all levels; with the Local Authority and headteachers being clear and equitable with devolved resources.

Equitable budget allocation: Devolving resources at a local level will vary according to the characteristics of each authority. The local context, including whether an authority is based in an urban, rural or island setting will have influence regarding the budget decisions within an authority. However, for all authorities, in an empowered system, decisions regarding budget allocations should be made in consultation with stakeholders, including schools and should aim to deliver equity, ensuring that every child and young person has the same opportunity to succeed.

Clarity: Comprehensive and clear information about funding allocations detailing how local priorities and needs have determined these allocations should be made available to stakeholders. This applies to both Local Authority schemes and school decisions.

Value for money: All decisions regarding resource use at Local Authority or school level should provide best value and continuous improvement, drawing on corporate financial regulations, schemes of delegation and procurement guidance.

1.5 A Common Framework

To harmonise how local schemes are described, a framework is provided for Local Authorities to populate, containing all the essential elements of a good scheme. Local Authorities can incorporate their own scheme detail into the framework, tailoring the narrative to reflect their local context and decisions. This supports the empowerment of schools based on the Local Authority context, ensuring local democratic decisions can be applied whilst maintaining a broad consistency between schemes. This will support stakeholders undertaking benchmarking, introduce an element of common understanding for users, support shared training, and aid peer review. The framework will assist Local Authorities and their headteachers, providing increased clarity and transparency to stakeholders. The framework can be accessed on the Scottish Government website at <https://www.gov.scot/policies/schools/devolved-school-management/>.

1.6 Expected, Recommended and Examples

The guidelines identify which areas are defined as expected, or as recommended, for Local Authority schemes. In some cases, the guidelines note statutory requirements on Local Authorities, or legislation which Local Authorities, headteachers, or others must comply with. **For the avoidance of doubt, nothing in these guidelines detracts from those legislative requirements, which must always be complied with.**

It is anticipated that every Local Authority scheme will apply the areas identified as “expected” within their individual scheme. Areas identified as “recommended” enable the Local Authority to determine their own decision in meaningful consultation with stakeholders. This supports authorities implementing a scheme that is fit for

purpose based on their local priorities and context. These are summarised in Appendix A: “Expected and Recommended Summary”.

Local Authority examples are provided in some areas to support discussion with stakeholders at both authority and school level, reinforcing meaningful consultation and the transparency of schemes. Authorities are not expected to seek to implement each of the examples included within the guidelines, but may find it helpful to consider whether examples are relevant to their circumstances.

1.7 Self-evaluation

To support school improvement, headteachers are recommended to undertake self-evaluation drawing upon the most appropriate and current tools as self-evaluation toolkits. At date of publication these include: Education Scotland: How Good is Our School 4, Quality Indicator 1.5 Management of Resources ([HGIOS4](#)) and the General Teaching Council Scotland (GTCS) ‘The Standards for Leadership and Management’ ([GTCS Standards](#)). To avoid increasing workload no additional toolkit has been created.

Local Authorities can make use of the “Expected and Recommended Summary” (Appendix A) to self-evaluate their schemes in addition to the peer review.

1.8 Additional Funding

Additional funding streams, including for example, at the time of publishing, Pupil Equity Funding (PEF), are not core funding and are not included within the traditional funding mechanisms of DSM schemes. Funding directly allocated to schools from sources other than the Local Authority should be available to headteachers to utilise as outlined in any associated conditions of the budget allocation. It is recommended that the principles of DSM (subsidiarity and empowerment; collaboration; accountability and responsibility; and clarity and equity), in addition to Local Authority policies, apply to all funding streams.

Many schools operate School Funds⁴ and Parent Council accounts; these are external to the Local Authority DSM scheme and are not included within the DSM guidelines.

⁴ School Funds refer to funding raised by the school through other avenues and are not devolved by the Local Authority, the headteacher is responsible and accountable for these funds. Each Local Authority will have their own processes and procedures for these funds.

2. Devolved School Management: Detailed Guidance for Local Authorities in developing a DSM scheme

2.1 General

Local Authority schemes are **expected** to demonstrate best value by following the characteristics of: commitment and leadership; sound governance at a strategic and operational level; accountability; sound management of resources; responsiveness and consultation; use of review and options appraisal; a contribution to sustainable development; equal opportunities arrangements and joint working.

DSM schemes are **expected** to support, promote and facilitate school empowerment, enabling headteachers to provide the efficient and most effective use of resources. Local Authorities, and their headteachers, are **expected** to demonstrate accountability at all levels, be clear and transparent, support collegiate working and strive to deliver national, Local Authority, local and school priorities.

It is **expected** that Local Authorities ensure that devolution is meaningful and empowers school leaders to make appropriate, and informed decisions to best meet their local needs in line with Local Authority policies, guidance and frameworks. It is recognised that there are areas of expenditure that are generally not considered suitable for devolution. These may be aspects that are beyond a headteacher's influence or are too bureaucratic to be managed at school level, have unacceptable levels of risk or have no impact on learning and teaching. A list of such aspects is detailed in Appendix B. It is **expected** that each Local Authority will identify any areas that are not deemed suitable for devolving to schools and include this information within their published schemes.

Headteachers are **expected** to deploy the school's budget in accordance with best value principles and Local Authority procurement arrangements, with appropriate support and guidance from their Local Authority. School expenditure should be in line with the School Improvement Plan supporting both Local Authority and national priorities and frameworks. Local Authorities and headteachers are required to support SNCT and LNCT agreements and guidance.

Local Authorities should aim to reduce, where possible, staff workload and bureaucracy in relation to the utilisation and the application of DSM schemes, including associated financial policies and procedures.

Local Authority Example

A recent Education Scotland inspection in **Renfrewshire** highlighted the importance of robust governance arrangements when dealing with the complexity of a range of different sources of funding. Although it could be argued that this is not entirely related to DSM, the overlaps and dependencies between each of them are highly significant if empowered headteachers are to feel supported by a strong central team from the Local Authority.

2.2 Format and Publication

Local Authorities are strongly encouraged and **recommended** to use the Scottish Government/COSLA common DSM framework document, which accompanies this document and can be downloaded from <https://www.gov.scot/policies/schools/devolved-school-management/>. The framework will support benchmarking, assist staff moving between Local Authorities, aid national and/or shared training opportunities and bring a common look and feel to Local Authority schemes.

It is **expected** that local schemes include any criteria and methodology used to create staffing models and other resource allocations as appropriate. If formulae have been applied, these should be included within the scheme. Headteachers should be able to interpret the formulae or resource allocations and reconcile this information with their school's resources.

Local Authorities are **expected** to publish their DSM scheme on an external facing authority website, providing access to public stakeholders. Where a school has a website, it is **recommended** that it includes a link to the Local Authority website directing parents and wider stakeholders to the scheme. As DSM schemes can be technical documents, and are **expected** to include detailed formulae, Local Authorities are **recommended** to consider publishing a summary of their detailed scheme using the Scottish Government/COSLA framework (available from <https://www.gov.scot/policies/schools/devolved-school-management/>) to provide all stakeholders with summary information which is both accessible and in plain language, maximising parental and/or stakeholder engagement.

2.3 Training

To support understanding and enhance confidence in DSM, Local Authorities are **expected** to provide specific training opportunities to individuals who make use of, or may influence, the DSM scheme. It is **expected** that this group would include headteachers and business managers or equivalent posts. It is **recommended** that training should also be considered for depute headteachers, aspiring leaders, LNCT trade union representatives and any other appropriate groups.

It is **recommended** that elected members, as decision makers responsible for the Local Authority corporate budget should also receive a tailored training programme. The National Parent Forum Scotland have advised that additional training for Parent Councils is not required as this may be viewed as a barrier for parental involvement. However, Local Authorities can offer training in conjunction with Parent Councils where they deem it appropriate.

It is **expected** that appropriate training should be available on a recurring basis to ensure new appointments to posts can be given sufficient induction, training and support to allow them to make informed decisions and to allow experienced staff to refresh their knowledge. Training should be available when new systems or processes are introduced. It is **recommended** that Local Authority headteacher induction programmes include a DSM element.

Where school or establishment staff have a delegated budget responsibility, it is **expected** that they will be aware of the aims and principles associated with DSM and best value and that they will adhere to financial regulations and Local Authority procedures and policies for the funds they are responsible for, which should include any staff member with a recognised budget responsibility.

Local Authority Examples

Falkirk run regular training and update sessions for headteachers, deputy headteachers and new staff on all matters to do with Finance, Resource, Property and Planning matters.

Inverclyde Finance training is built into the practical guide to taking a school forward, which is available for any aspiring headteacher. The induction programme also includes one to one sessions on finance with the appropriate finance officer. This covers DSM.

As part of the leadership development programme, **Dumfries and Galloway** run two sessions each year to support current headteachers and aspiring leaders with managing resources - “Strategic Management of Budgets”. As part of this session, some of the mechanics of DSM are covered, including the local scheme. The session also focuses on HGIOS4 Section 1.5 Management of Resources to promote equity, using the challenge questions from HGIOS4 to promote discussion, challenge and share experience.

Headteacher training in **Dundee** includes information on their Roles and Responsibilities related to Finance, and the recommendation that schools should have a DSM and School Fund Consultative Committee. Dundee also makes reference to HGIOS4 in training and the use of data when making spending decisions at school level

Dedicated training days are set up for **Shetland Islands** headteachers, as well as one-to one training opportunities for headteachers and their clerical staff.

2.4 Consultation, Engagement and Transparency

It is **expected** that local DSM schemes are accessible and in plain language, maximising engagement and supporting transparency. Local Authorities are **expected** to make information available to all stakeholders in relation to the Local Authority budget, delegated budgets to schools, including identifying areas of expenditure that are not devolved to headteachers.

It is **expected** that there will be meaningful consultation and engagement at all levels among the Local Authority, headteachers and all stakeholders. It is **expected** that meetings take place to inform appropriate resource decisions, including, for example: budget, staffing models and savings. To facilitate meaningful consultation and collaborative decision making, it is **expected** that Local Authorities form appropriate mechanisms or forums for regular engagement and consultation with headteacher

and wider stakeholders. These should be formed in conjunction with headteachers and Local Authority education management. A range of consultation approaches are already in place within Local Authorities including:

- regular finance forums
- headteacher/trade unions/staff working groups
- DSM committees
- area / school cluster meetings
- quality improvement forums
- feedback from surveys at school, school cluster and Local Authority levels
- headteacher short-life work streams

It is an **expectation** that headteachers have an input into areas affecting school resources, at a local, area or schools cluster level. This includes criteria used when determining how a formula is devised, how the formula is applied to schools, methods of calculating and distributing budget, any associated savings, school staffing models and any other appropriate allocations of resources.

Local Authority Examples

The **Dundee** Star Chamber group meets four times per year with all headteachers invited to attend. The Star Chamber meetings specifically focus on budget issues, with the meeting chaired by the Executive Director and Senior Management Team. In addition, Dundee's Staffing review group is chaired by the Chief Education Officer and consists of headteachers and central managers. This group covers all areas associated with the staffing process including allocation of staffing budgets. Lastly, there are sub-groups chaired by headteachers who involve other headteachers in taking forward certain areas. This year these groups were involved in revising staff formulae, given the budget pressures that the authority faced, and also focused on improving the recruitment process.

School Operating Management meetings in **Fife** are held termly; the meetings are chaired by a Head of Service and all headteachers are invited. The meetings focus on business matters including such areas as recruitment, staffing models, budget allocations, savings and facilities management. Three meetings are scheduled over different days to provide headteachers with the flexibility to attend the most suitable meeting to maximize attendance. This format is used for meaningful consultation with all headteachers (over 170 including nursery, special, primary and secondary). In addition, Cluster Chair Headteacher Meetings, Working Groups or sector specific headteacher meetings are also utilised for particular areas of work and for detailed discussion regarding specific budget savings.

In **North Ayrshire**, all schools are required to have a DSM Committee to discuss resource matters, the committee is formed from all staff groups and includes parent council representatives.

Transparency is further supported by the sharing of devolved staffing allocations with all school sectors in the local authority area - Nursery, Special, Primary and Secondary.

As the leaders of learning in their schools, and as senior officers of the Local Authority, headteachers are **expected** to take the lead role in ensuring their school community is empowered at all levels, this includes full consultation with staff. Headteachers are **expected** to consult with staff, parent councils, pupils, trade unions and the wider community on appropriate matters to inform resource decisions. It is **expected** that headteachers provide clear information on local budgets and resource allocation including school staffing models, DSM decisions, allocation of departmental or class resources, formulae, criteria or methodologies used within the school. To facilitate consultation, it is **expected** that headteachers form appropriate mechanisms or forums for regular engagement and consultation with stakeholders to discuss and consult on any relevant area. To facilitate collective decision making a range of consultation approaches are in place within schools which include:

- School committees
- staff meetings
- parent council
- pupil councils
- working groups

Headteachers are **expected** to ensure that any costs on families are minimised to ensure equality of access. However, where charges are deemed unavoidable, it is **recommended** that any anticipated pupil charges for curricular or extra-curricular activities (for example Home Economics, or school trips), or other costs (such as school uniform) requiring funding contributions from parents/carers are clearly detailed in school information published at the start of the academic session, supporting transparency. It is further **recommended** that any potential financial assistance or opportunities available to the pupil, or any discounts or exemptions available, for example in relation to pupils in receipt of free school meals, are included within this information.

2.5 Collaboration

DSM schemes should be informed by local priorities to enable them to contribute towards shared agendas and improved outcomes, allowing stronger partnership working between schools and with other agencies and stakeholders.

Local Authority decisions about education spending are expected to be made in a collegiate and transparent way, paying due regard to their wider responsibilities, including Getting it Right for Every Child (GIRFEC) and the role of Local Authorities as Corporate Parents.

Effective joint working, encompassing headteachers, school staff, Local Authority chief officers, community partners, other schools, colleges, universities and the Regional Improvement Collaborative are key. Meaningful collaboration can support the best use of resources, through arrangements for strategic planning of local provision, economies of scale and the pooling of resources to meet locally identified educational needs. To further develop this, it is **recommended** that Local Authorities consider empowering an area or school cluster, enabling headteachers to influence decisions and resource use across a geographical or cluster basis.

Devolving budget resource on an area or school cluster basis also requires headteachers to be responsible for these resources to their stakeholders and Local Authority.

The Regional Improvement Collaborative should consider developing and sharing models of best practice in empowerment and effective decision making within the funding and resources context.

In an empowered system, headteachers are **expected** to be collaborative and collegiate in their approach, challenging themselves and stakeholders to be solution focused and embrace joint working with the learning community, teachers, support staff, partners, other schools and the Local Authority. It is **recommended** that headteachers work together to share and maximise resources in order to influence outcomes across geographical areas or school clusters.

Local Authority Examples

In **Inverclyde**, the recently implemented ASN review has devolved management of resources to localities of schools. This means that headteachers discuss allocations of support on a locality basis and can allocate resources accordingly.

The **Falkirk** Senior Management Team holds termly meetings with Parent Council Chairs and representatives to discuss all matters relating to budgets, finances and resources. In addition through collaboration, secondary schools now manage the provision and distribution of PE and Music teachers across all primary schools within their cluster.

In **Glasgow**, by headteachers pooling funding together, Secondary schools have engaged STEM staff to work collegiately to deliver training and staff development.

West Dunbartonshire have robust systems in place for the effective management and monitoring of finance, ensuring strong financial governance and delivery of best value at both corporate and project level. At corporate level, the Community Planning Partnership and Educational Services committee ensure accountability for the delivery of Education objectives. The Council provides the conditions and environment for leaders to make innovative decisions on available spend, based on research and self-evaluation activities. Through a variety of consultation processes, headteachers engage well with stakeholders in their school community to gather views on how funding is used, and to report on progress with delivery of projects/interventions. Through a variety of communications channels, headteachers share successes of projects/interventions, ensuring stakeholders are aware of impact to help inform next steps.

Na h-Eileanan Siar Primary and Secondary headteachers have collectively identified a set of nine key actions based on the Department's four priorities and Business Plan as well as current national priorities and developments in education. To deliver the nine actions, a model of Headteacher Hubs has been developed that has created three hub teams of headteachers, each led by one of the headteachers and supported by a Senior Education Officer. Each of the hubs has been assigned three of the nine priorities. Headteacher Hubs serve two key purposes. They

empower headteachers, as senior officers of the Comhairle, to lead on the delivery of key priorities as well as to take devolved responsibility for budget spending. It also addresses the national priority to tackle bureaucracy through more effective sharing of development work across the three Hubs to benefit all schools, and raise learners' attainment. Each Hub is led by a headteacher with a group of other associated headteachers, as well as any co-opted members they wish to include for the purposes of meeting their specific objectives.

2.6 Staffing

Local schemes are **expected** to devolve the appropriate resources to schools, whilst ensuring that legislative and contractual requirements are met and local circumstances and needs taken into account.

Local Authorities are required to develop and implement staffing models for all school sectors, within which headteachers are **expected** to deliver the most appropriate and efficient use of staff, ensuring equity, transparency and clarity whilst promoting and supporting collaboration and collegiate working. To facilitate this, it is **expected** that headteachers are empowered to design a staffing structure to suit their school's context, within the budget delegated to the school by the authority.

Local Authorities are **recommended** to consider the risks associated with devolving staffing. This includes discussing and consulting with headteacher and appropriate forums around the complexities and risks associated with staffing allocations. Local schemes will vary and may be determined or influenced by systems and processes in place for finance budget setting. This may include budgets based on named individual salary placements, average staff salaries, top of teaching scale salary, cash or points models, or any other methodology used.

Consideration should also be given in relation to long term absence and family leave costs which may impact on budgets. Variances in local schemes may also exist owing to the accounting approach applied for specific individual circumstances noting the salary differentials for roles such as chartered teachers, assimilated teachers, career pathway lead teachers or in relation to conservation of salary or changes to job sizing grades. For all staffing matters, it is **expected** that headteachers must adhere to the appropriate legislation, Local Authority, SNCT and LNCT agreements, Working Time Agreements and guidelines.

Headteachers are **expected** to play an active role in designing and reviewing the recruitment processes and staffing approaches, both for their own school/s and for the Local Authority.

It is **expected** that headteachers are consulted on the allocation of all staff groups to their schools, including support staff. Staffing allocations of support staff should be supported by a clear and transparent methodology for the distribution of staff either to schools or clusters.

Local Authority Examples

A primary school in **Dumfries and Galloway** was entitled to two deputy headteachers. The headteacher has chosen to put in place only one deputy headteacher post and utilise the funding from the other position to support development opportunities across the staff group. These are project type arrangements to complete designated pieces of work.

A Primary School in **East Lothian** had an increasing school roll and were entitled, per the staffing model to receive an additional deputy headteacher, increasing from one to two deputy headteachers. The headteacher elected to utilise the budget resource to maximise the existing deputy headteacher's management time, thereby removing the teaching commitment. This further enabled the headteacher to create a principal teacher post through use of the balance of resource available.

In **Falkirk** the annual teacher recruitment and probationer intake exercise for primary schools is centrally coordinated with input from headteachers groups to reduce the demands on their time. Primary headteachers have also used their devolved budgets to collectively fund a central support post to source and manage supply cover on their behalf.

Fife manage a generic recruitment campaign for class teacher posts for the new August academic session. This generic campaign is led by headteachers, supported by the central team. Headteachers attend a centrally led recruitment session at which the headteachers devise the interview format and questions. The interview panels are solely formed by headteachers who make a recommendation to appoint candidates to Fife, or not. The central team then undertake all reference and recruitment checks before allocating the candidate to a post in Fife. To staff schools, headteachers submit a 'Staffing Return' for the new August session whereby they identify vacancies or surplus staff. For vacancies, the headteacher identifies the nature of the vacancy (permanent/temporary/full time/part time) and can identify how they wish the post to be filled, for example the allocation of a new probationer or the appointment of a teacher.

Furthermore, for the allocation of a new probationer they can request a student who has completed a placement within their school, or are allocated a name by the central team. For the allocation of a teacher, they can request a named individual from the generic interviews and this allows headteachers to request to retain their current probationer if they wish to do so. Through this system headteachers are able to greatly influence their school staffing allocation. The Directorate seeks to accommodate headteacher requests whilst taking account of any other factors, including staff members requiring transfer, the overall school pupil roll, the authority's probationer allocation and any other local matters.

Perth & Kinross Headteachers are authorised to organise their support staff structure as required. Resources continue to be allocated to schools using the DSM funding allocation annually.

Renfrewshire engaged extensively with primary headteachers in order to design a revitalised recruitment process for the annual staffing exercise, which sees

headteachers lead the selection procedures forming interview panels and recommending deployment based on a competence based approach. This is backed up by support from HR and recruitment professionals within the Local Authority in order to ensure openness, fairness and transparency. By empowering headteachers in this way, workload has been reduced and both schools and individual teachers feel more valued for their contribution.

2.7 Professional Support

To support empowered schools, Local Authorities are **expected** to provide the appropriate support and challenge to headteachers. Empowered schools should be underpinned by professional high-quality teams with the appropriate capacity to support headteachers. This may be in the form of business managers (or equivalents), finance, human resources and facilities teams. It is **expected** that access to professional support is available to all headteachers, in all school establishments. It is **expected** that there should be transparency in any formulae or methodology used in allocating professional support to schools.

Local Authority Examples

Argyll and Bute Finance Assistants are assigned to schools to provide financial advice to the headteacher. These roles are managed by the corporate finance teams with the posts being based in schools. The finance assistants provide support to more than one school, usually on a cluster basis.

Each secondary school in **Falkirk** has a dedicated Resource Manager and other schools are supported by a centrally based team of Resource Officers.

Scottish Borders undertook a review during 2016/17, with the aim of developing more integrated and streamlined management and administration arrangements on a locality, cluster basis. A new structure was developed and consulted on, and a Business Manager was appointed for each high school cluster (of which there are 9) and administration staff for both secondary and primary schools were matched into the new, cluster-based structure. The resulting standardisation and improvement of processes and policies has enabled a necessary move away from inconsistencies in approaches to business support across over 70 Scottish Borders schools, and is facilitated by investment in digital improvements for staff, parents and pupils. The clusters vary in size, and contain a mix of rural and urban settings. The Business Manager posts are line managed by a Business Support Service Manager at Council HQ, who reports to the Service Director, Customer and Communities, and funding for the new structure now sits within this service.

Stirling Business Managers are based in each of the 7 secondary schools and support the specific secondary school. The posts are managed by the headteacher and funded by the overall secondary staffing model. 40 primary schools are supported by 2 Primary School Resource Officers, who in turn support a cluster of nursery, primary schools and one special school. They are managed by the Business Improvement Team Leader within the Broad General Education Service. The secondary business managers manage the non-teaching staff, monitor and

report on the school devolved budget; assist the headteacher in the strategic deployment of staff and day to day management and co-ordination of all HR issues devolved to schools. They are responsible for all buildings and facilities management issues and liaise with other Council Services or contractors as appropriate. They assist the headteacher in the strategic management of all finance related issues. The Primary School Resource Officers support, advise and assist headteachers in the strategic management of all resource related issues. They all support the schools in working within the Legal and Financial Framework of the Council and are supported by our Corporate Teams including Finance, HR, procurement and property teams.

2.8 Accounting Matters

Headteachers are **expected** to be given the flexibility to manage and determine the best use of the resources devolved to schools. To facilitate this, headteachers should be permitted to move budgets between devolved budget headings (referred to as budget virement) subject to Local Authority accounting principles, schemes of delegation and financial regulations.

Locally determined virement criteria, including any maximum percentage, financial limits or excluded budget areas, are **expected** to be included within the published local scheme.

Local Authority Examples

In **Angus** headteachers are permitted to divert monies between devolved budgets. However, no funds should be diverted which have an ongoing commitment into future years e.g. diverted funds cannot be used to permanently increase staffing levels as the source of funding cannot be guaranteed in future years.

To support Schools with their individual budget control and financial reporting, **Falkirk** provide schools with 10 unique financial ledger devolved cost codes that allow schools to decide themselves what costs should be charged and monitored against them. A bespoke devolved budget report is also available to headteachers to monitor devolved budgets directly.

In **Glasgow**, virement of up to £1,000 across all supplies and services budget lines and Virement of up to £5,000 across all classroom supplies lines is allowed. However, virement of up to 10% of the entitlement budget of a school's sickness absence cover (5% pre-Christmas and 5% post-Christmas) is subject to approval from the Executive Director of Education Services.

Inverclyde currently allow virements of up to £20,000 out of employee budget lines to any budget lines within the overall DSM budget. They also allow virements of up to 10% of non-salary budget lines to any DSM budget line.

In **Aberdeenshire Council** headteachers are provided with details of devolved budgets at the beginning of each financial year, which are updated post September-Census to reflect roll movements. Although Primary schools do not have access to the General Ledger, transaction reports are provided regularly. Budget monitoring

statements are also provided quarterly by a centrally based Finance team, who are available to provide advice and support to headteachers.

Secondary Teaching staff costs, including long and short-term supply, are now fully devolved to schools. Budgets are based on the actual cost of staff in place and likewise expenditure is also on actual costs charged through the ledger. All schools are provided with an annual monitoring template, which allows them to record actual costs against budget and also to forecast the impact of staff changes.

Secondary schools also have access to monthly payroll reports, which are used to monitor the devolved teaching budget, and members of the Finance team are currently available to provide advice and support to Secondary headteachers and Business Managers. In terms of process, an accountant will visit each secondary at the beginning of the financial year to discuss the devolved budget and associated spending plans. Follow up visits are then offered later in the year to discuss the forecasted budget position and an update on spending plans. A meeting is held with a Head of Service/HR/Finance prior to the commencement of the new financial year to discuss staffing entitlement and address any budget issues. Secondary schools do have access to the Ledger, but also receive regular reports from the centre on all devolved budgets.

Aberdeenshire is also piloting the devolvment of ASN budgets to cluster schools. Two clusters representing different school sizes and demographics have been involved in this pilot. The budgets involved include teaching and non-teaching staff, together with budgets for flexible learning pathways, per capita and Continuing Professional Development. Each cluster collectively is then responsible for determining the spending plan for their budget that best meets the ASN needs within their cluster. Support from the Finance team is provided on a similar basis to that provided to secondary schools.

Headteachers are **expected** to be given the ability to carry forward budget underspends and overspends from one financial year to another in line with Local Authority criteria. This will provide greater flexibility, maximise best value and align school year expenditure with the School Improvement Plan, recognising that expenditure commitments operate on an academic and not financial year basis. Locally determined carry forward criteria, including any maximum percentage or financial limits, or where a carry forward provision is determined by the overall service, directorate or authority budget position, are **expected** to be published within the scheme.

It is **recommended** that local consideration is given to the use of carry forward of underspends and that the intended uses of any carry forwards are identified in School Improvement Plans or school budget plans.

Local Authorities should give consideration to enabling schools and establishments to deposit funds to save budget underspends over a number of financial years for planned and agreed future spending requirements.

It is **recommended** that Local Authorities consider how carry forward of overspends are managed and that associated processes or arrangements are included within the published scheme.

Local Authority Examples

In the **City of Edinburgh Council** headteachers may carry forward any surplus funds from one financial year to another, subject to this surplus being less than 2.5% of the school's total delegated budget. In addition, Nursery schools may carry forward 10% of their total delegated budget. Any budget deficit incurred by the headteacher will be carried forward in full to the next financial year and will have the effect of reducing the total funds available for expenditure in that year. The Executive Director of Communities and Families may instruct headteachers not to budget a deficit where there is reason to believe that this would create financial difficulties for the Council. In exceptional circumstances the Executive Director of Communities and Families may amend the amount of surplus or deficit to be carried forward but will give reasons for doing so.

Over the period 2017/18 to 2019/20 initially headteachers in **East Renfrewshire** have the facility to carry forward a percentage of their DSM allocation as budget underspend at the financial year end, subject to the overall Education Department budget being underspent. For 2017/18 this was set at a maximum of 5% of devolved resources, reducing to 3.5% in year two and 2% the following year with a wider review of DSM thereafter to take account of new national guidance. The budget devolved to a school in any financial year should be targeted at the priorities in the School's Improvement Plan and should be for the benefit of current pupils. Headteachers must therefore ensure that all carry forwards are planned and should not be used as a means of setting aside resources for the future with no identified plans for the carry forward. All carry forwards must be entirely used within a three-year period aligning with the School Improvement Plan and its timeframe. Where an overspend occurs, the shortfall in budget will be deducted from the school's DSM budget via an increased savings target in the following financial year and the headteacher would be required to provide an action plan to evidence how they will deliver a balanced budget by the end of that same financial year. If a school's DSM budget outturn position is unreasonably or persistently overspent, despite strong budget monitoring and support, then such action could be considered by the Director of Education as grounds for disciplinary action.

To reduce bureaucracy **Falkirk** has set financial levels for each school sector whereby underspends falling within these parameters are automatically carried forward. Underspends above these levels are subject of a simple business case being submitted to explain the reason for underspend and what the schools plans are for it. The acceptable parameters are: Early Years establishments £5,000, Primary Schools (Single Stream) - £10,000, Primary Schools (2/3 Stream) - £15,000; Secondary Schools - £30,000; and Special/ASN Establishments - £15,000.

The **West Lothian** the maximum carry forward is set at 2.5% of all fully devolved budget headings. Any balance greater than 2.5% will not be available to the school in the following financial year. Any carry forward above 1% requires Head of

Service. Schools may wish to use this carry forward not only for on-going revenue expenditure, but may also wish to save towards a longer term planned objective (e.g. school refurbishment).

Inverclyde allows a carry forward of up to 10% of the entitlement budget. In addition to this, headteachers are allowed a carry forward of planned underspend to be placed into a capital item replacement fund (CIRF) which can be held for up to 3 years. The minimum deposit is £500 and the maximum is £10,000 annually. This fund can then be used in the future 3 years to purchase planned equipment or resources e.g. reading schemes / smaller capital items .

Renfrewshire allows schools to carry forward a proportion of funds in particularly budget lines. Headteachers are expected to justify the purpose of such carry forward to ensure it is in line with the expectations of the 2012 guidance that ‘today’s money be for today’s children’. This provides a degree of accountability, whilst ensuring flexibility for the purchase of larger items which may not be possible within a single financial year.

2.9 Scheme Review

Local Authorities are **expected** to undertake a full review of their scheme every three years though peer and stakeholder evaluation. Local Authorities may wish to consider utilising the Regional Improvement Collaborative which they are a member of, although consideration should also be given to working with Local Authorities beyond the collaborative where demographics, scale, size and context may be comparable. Peer review should utilise the Scottish Government and COSLA quality assurance template.

In addition to working with a partner Local Authority, it is **expected** that the three-year review should include stakeholders from the home Local Authority and the wider community. It is **recommended** that these stakeholders include headteachers and other Local Authority representatives, for example, business managers or equivalent, school staff groups, trade unions, parents, pupils, corporate partners (such as finance, human resources and procurement) and any other community stakeholders as deemed appropriate.

It is **recommended** that Local Authorities, as part of their ongoing self-evaluation, update the DSM scheme if required following formal agreement of the Local Authority budget, or to recognise any Local Authority policy decisions which may have a consequential impact on their scheme.

It is **recommended** that headteachers undertake self-evaluation of DSM in their own school’s context using the most appropriate and current tools available. At date of publication these include; Education Scotland - How Good is Our School 4 (HGIOS4), Quality Indicator 1.5 Management of Resources; GTC Scotland - The Standards for Leadership and Management: supporting leadership and management development; Scottish Government and COSLA – Education Reform Joint Agreement and Headteachers’ Charter.

Local Authorities may wish to utilise the “Expected and Recommended Summary” (Appendix A) as their self-evaluation checklist or for use during their annual internal review.

Local Authority Example

East Lothian’s Service is incorporating HGIOS4, Quality Indicator 1.5 Management of Resources as part of their internal reviews and improvement processes within their school establishments.

Appendix A: Expected and Recommended Summary

These guidelines recognise that in relation to DSM the functions and roles undertaken within an empowered school system are not restricted to headteachers. Although the role of headteacher is identified throughout, shared and distributed leadership means that other staff members or groups may undertake an area or aspect of DSM. The guidelines support distributed leadership, collaboration and consultation whilst recognising that the accountability and responsibility will reside with the headteacher as the leader of their school, supported by the Local Authority.

In some cases the guidelines note statutory requirements on Local Authorities. For the avoidance of doubt, nothing in these guidelines detracts from those statutory requirements, which all Local Authorities must comply with.

General	
Expected	Recommended
Local Authorities schemes adhere to financial regulations, deliver best value and ensure the efficient, fair and equitable distribution of resources.	
Headteachers deploy the school's budget in accordance with best value principles and Local Authority procurement arrangements, with appropriate support and guidance from their Local Authority.	
Local Authorities should ensure that devolution is meaningful and empowers school leaders to make appropriate, and informed decisions to best meet their local need in line with legislation and Local Authority policies, guidance and frameworks.	Local Authorities scheme clearly define areas of resources that are not devolved to schools.
Headteachers are expected to ensure school expenditure is in line with the School Improvement Plan supporting the relevant Local Authority strategic plans, priorities and the National Improvement Framework.	
Local Authorities and headteachers must adhere to legislative requirements, SNCT and LNCT agreements and guidance.	

Format and Publication	
Expected	Recommended
	Local Authorities are strongly encouraged to utilise the format of the DSM Framework for their scheme. This is available from https://www.gov.scot/policies/schools/devolved-school-management/ .
Local Authorities are expected to publish the DSM scheme on the external facing website.	Where a school has a website, it is recommended that it should include a web link to the Local Authority published scheme.
	Local Authorities should consider publishing a summary of the authority's scheme, providing stakeholders summary information in an accessible way, using plain language.
Published schemes should include the criteria and methodology used to create formulae-based allocations, staffing models and other resource allocations as appropriate. If formulae have been applied, the formulae should be included within the scheme.	
Training	
Expected	Recommended
Local Authorities should provide specific DSM training to key staff groups including headteachers and business managers or associated posts.	It is recommended that training opportunities are made available to depute headteachers, aspiring leaders, elected members, and any other appropriate staff who utilise or influence DSM decisions.
Where school or establishment staff have a delegated budget responsibility they should be aware of the aims and principles associated with DSM, best value and adhere to financial regulations and Local Authority policies for the funds they are responsible for.	Training should be available for new and experienced staff members.
Training should be available on a frequent and recurring basis.	School leaders have access to local and/or national leadership programmes and training which ensures an approach to DSM that encourages confident decision-making to promote better outcomes for learners.

Consultation, Engagement and Transparency	
Expected	Recommended
Consultation and engagement at all levels between Local Authorities, headteachers and stakeholders should take place to inform appropriate resource decisions, including: budget, staffing models and savings. This includes consultation on criteria used when determining how a formula is devised or applied and other methodology of distributing resources.	
Local Authorities should form appropriate mechanisms or forums for regular engagement and consultation with headteachers and wider stakeholders as appropriate.	
Consultation and engagement between headteachers and staff groups should take place to inform appropriate resource decisions, including: budget, staffing models, department budget allocations and savings.	Headteachers should form appropriate mechanisms or forums for regular engagement and consultation with staff, parents and wider stakeholders as appropriate.
Headteachers should consult with staff, parent councils, pupils and the wider community on appropriate matters, these may include school staffing models, DSM decisions, allocation of departmental or class resources and include formulae or criteria used within the school.	
Headteachers share and discuss local school decisions, budget and resource allocations with staff groups and wider stakeholders as appropriate.	It is recommended that at school level this includes methodology and distribution of budgets and resources.
Local Authorities make information available to all stakeholders in relation to the Local Authority budget, education budget and delegated budgets to schools, including identifying areas of expenditure that are not devolved to headteachers.	
It is expected that DSM schemes, and information published for stakeholders is accessible and is in plain language.	
Headteachers are to ensure that any costs related to the curriculum are minimised to ensure equality of access.	Where charges exist for pupils, including both curriculum or extra-curricular activities (class materials, school trips, school uniform, etc.) they should be clearly detailed in school information published at the start of the academic session.

	Any potential financial assistance, discounts or exemptions available, for example in relation to pupils in receipt of free school meals, should be included within this information.
Collaboration	
Expected	Recommended
DSM schemes should be informed by local priorities to enable it to contribute towards shared agendas and improved outcomes, it should enable stronger partnership working between schools and other agencies and stakeholders.	
Local Authority decisions about education spending are made in a collegiate and transparent way paying due regard to Getting it Right for Every Child (GIRFEC) and the role of Local Authorities as Corporate Parents.	It is recommended that Local Authorities consider empowerment on an area or school cluster basis, enabling headteachers to influence decisions across geographical areas or school clusters.
Headteacher are expected to be collaborative and collegiate in their approach, challenging themselves and stakeholders to be solution focused embracing joint working with the learning community, parents, children and young people, teachers and support staff, partners, other schools and the Local Authority.	It is recommended that headteachers work together to share and maximise resources to influence outcomes across geographical areas or school clusters.
Staffing	
Expected	Recommended
Local Authorities should empower headteachers to design a staffing structure to suit the school's context within their delegated budget and in accordance with SNCT and LNCT agreements and guidelines.	Local Authorities consider their approach when devolving staffing, this includes discussing with Headteachers the complexities and risks associated with staffing allocations.
Schemes should seek to devolve the appropriate resources to schools, whilst ensuring that legislative and contractual requirements are met and local circumstances and need taken into account.	
The Local Authority with headteachers will seek to deliver the most appropriate and efficient use of staff resource ensuring equity, transparency and clarity whilst promoting and supporting collaboration and collegiate working.	

Headteachers should play an active role in designing and reviewing recruitment and staffing approaches, both for their own school/s and for the Local Authority.	
For all staffing matters, headteachers must adhere to the appropriate legislation and Local Authority, SNCT and LNCT agreements and guidelines.	
Headteachers should be consulted on the allocation of support staff to schools.	

Professional Support

Expected	Recommended
Headteachers in all schools should have access to professional support teams and functions.	
There should be transparency in the formulae or methodology in allocating professional support to schools.	

Accounting

Expected	Recommended
Headteachers should have the provision to carry forward budget underspend or overspend in line with agreed and published Local Authority policy and criteria.	Intended use of carry forward of budget underspends are identified in School Improvement Plans or school budget spending plans.
	Procedures for managing carry forward of overspends are included within the scheme.
	Consideration is given towards enabling schools to deposit funds to save budget for planned and agreed future spend.
Headteachers should have the provision to vire budget between budget headings in line with agreed and published Local Authority policy and criteria.	

Scheme Review	
Expected	Recommended
Local Authorities undertake a three-year review with stakeholders and a peer Local Authority as they determine appropriate.	Stakeholders may include headteachers, business managers, all staff groups, trade unions, parents, pupils and corporate partners such as finance, human resources and procurement as examples.
	Local Authorities are recommended, as part of ongoing self-evaluation, to update DSM schemes if changes are made which have a consequential impact on a scheme.
	<p>Headteachers are recommended to apply national standards and to undertake self-evaluation drawing upon the most appropriate, and current tools, at date of publication these include, but are not limited to:</p> <p>Education Scotland - HGIOS4 QI 1.5 Management of Resources</p> <p>GTC Scotland - The Standards for Leadership and Management: supporting leadership and management development</p> <p>Scottish Government and COSLA – Education Reform Joint Agreement and Headteachers’ Charter</p>

Appendix B: Areas of expenditure that are generally not considered suitable for devolution

It is **expected** that Local Authorities support meaningful devolution that empowers school leaders to make appropriate, and informed decisions to deliver the best outcomes for children and young people.

Whilst headteachers should be given maximum flexibility over their budgets, there are areas of expenditure that are generally not considered suitable for devolution. The reasons for this may include, but are not limited to, areas of spend that:

- are outside the influence of a headteacher
- are too bureaucratic
- have unacceptable levels of risk
- benefit from economies of scale
- require specific professional expertise
- are complex by their nature

Through consultation it is clear that for a variety of locally determined reasons, differing approaches exist within the Local Authorities. The first list, presented below (**a**), covers areas that are generally recognised as *not* enhancing headteacher empowerment, and the second list (**b**) presents areas that Local Authorities may have determined locally agreed procedures according to their existing systems and processes.

It is **expected** that each Local Authority identifies and lists any areas that are not devolved to schools within their published schemes.

a. Areas identified as not generally suitable for devolving:

- Rent in relation to school premises
- Capital expenditure, including PPP/PFI costs
- Property Insurance
- Non-Domestic Rates
- Statutory Local Authority contracted work on managing the school estate
- Corporate support function costs for example Finance, HR, and Legal functions
- School clothing grants
- Education Maintenance Allowances
- Home to school pupil transport
- Premature retirement costs
- Local Authority Information Management Systems (currently SEEMIS)
- School meals

b. Areas which consultation highlighted as having a variety of approaches, and requiring local determination:

- Waste Collection
- Energy costs
- Carbon charges
- Janitorial and Cleaning staff costs
- Central support services for example Educational Psychology, Quality Improvement Teams, Learning Support and Behavioural Support Teams, Speech and Language Teams, hearing and visually impaired support, dyslexia or significant and enhanced provision for additional support. Each authority will have their own specialist teams which will differ.
- Examination fees
- Long Term Sickness Absence
- Family Leave Costs
- Visiting Teachers
- Music Instructors
- Parent Council expenditure

Appendix C: Stakeholder Engagement

The following organisations have been consulted during the preparation of this guidance. The draft Guidelines was also published on the Scottish Government website for comment between 5 April 2019 and 8 May 2019 date, to fulfil Scottish Ministers' duty to consult on proposed guidance under section 13 of the Standards in Scotland's Schools Act 2000.

Aberdeen City Council	Renfrewshire Council
Aberdeenshire Council	Scottish Borders Council
Angus Council	Shetland Islands Council
Argyll and Bute Council	South Ayrshire Council
City of Edinburgh Council	South Lanarkshire Council
Clackmannanshire Council	Stirling Council
Comhairle nan Eilean Siar	West Dunbartonshire Council
Dumfries and Galloway Council	West Lothian Council
Dundee City Council	ADES Resources Network
East Ayrshire Council	ADES Personnel Network
East Dunbartonshire Council	Association of Headteachers and
East Lothian Council	Deputies in Scotland (AHDS)
East Renfrewshire Council	Educational Institute of Scotland (EIS)
Falkirk Council	Education Scotland
Fife Council	National Parent Forum Scotland
Glasgow City Council	The National Association of
Highland Council	Schoolmasters Union of Women
Inverclyde Council	Teachers (NASUWT)
Midlothian Council	School Leaders Scotland (SLS)
Moray Council	Scottish Secondary Teachers
North Ayrshire Council	Association (SSTA)
North Lanarkshire Council	Voice
Orkney Islands Council	
Perth and Kinross Council	

Appendix D: Fair Funding Reference Group and Working Group Membership

Fair Funding Reference Group Membership

Scottish Government
Convention of Scottish Local Authorities (COSLA)
Association of Directors of Education Scotland (ADES)
Directors of Finance
Society of Personnel and Development Scotland (SPDS)
Society of Local Authority Chief Executives (SOLACE)
Society of Local Authority Lawyers and Administrators (SOLAR)

Fair Funding Working Group Membership

Scottish Government
Convention of Scottish Local Authorities (COSLA)
Association of Directors of Education Scotland (ADES)
Association of Headteachers and Deputies in Scotland (AHDS)
Educational Institute of Scotland (EIS)
School Leaders Scotland (SLS)



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DEVOLVED SCHOOL MANAGEMENT

Framework Document – for Local Authorities

June 2019



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Devolved School Management Framework Document – for Local Authorities

This framework document has been developed to help you update your existing Devolved School Management (DSM) scheme, or to create a new DSM scheme if you choose to do this. It reflects the principles of the new DSM guidelines and offers a suggested set of information and headings to include, drawn from the table of ‘expected’ and ‘recommended’ areas, attached within this document at Appendix A for convenience.

For information, when updating or creating your DSM scheme, Local Authorities are expected to publish the scheme on an external facing website, and it is recommended that a web link to this is also made available on School websites if available.

Separately, in addition to this publicly available full version of the DSM scheme, it is recommended that an accompanying summary is also created, in the form of a leaflet or similar, with headline information drawn from your scheme. An example of information you may wish to include in this is attached at Appendix B.

[Local Authority name]

Devolved School Management Scheme [year]

Formal Review date:

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1. INTRODUCTION

Please find below a general overview on DSM guidance that you may wish to include in your own DSM publication introduction.

You may wish to also include in your introduction:

- Your individual LA context, including web links to your website
- Directorate/Service, Locality plans
- Summary information on pupil numbers, the number of educational establishments, geographical and demographic contexts
- Your own delivery principles and legal requirements placed on your Authority
- Role of the Parent Council
- General legislative framework information

Devolved School Management Overview

Devolved School Management was introduced in 1993 to enhance and improve the management of resources at school level. The DSM guidance was reviewed in 2006, and again in 2012, taking account of the changing economic and financial climate for both Local Authorities and the Scottish Government. In June 2017 the Scottish Government consulted on changes to DSM as part of the wider "*Fair Funding to Achieve Excellence and Equity in Education*" consultation.

The updated DSM guidelines, published in summer 2019, seek to build and improve on the DSM Guidelines of 2012 and, critically, reflect and integrate with the Education Reform Programme and priorities emerging from the Scottish Government and COSLA Education Reform Joint Agreement of June 2018. These Guidelines can be found here <https://www.gov.scot/policies/schools/devolved-school-management/>

The Guidelines have been devised to help Local Authorities develop their own Devolved School Management (DSM) schemes. The new Guidelines aim to encourage participation from Local Authority wider teams, schools and parents.

They have been prepared through collaboration and consultation with a wide range of stakeholders. Collaboration is key to a successful local DSM scheme and this is captured within the Joint Agreement and Headteachers' Charter to which these guidelines align and support.

PRINCIPLES OF DEVOLVED SCHOOL MANAGEMENT

The updated DSM principles, agreed by the Fair Funding Reference Group and building on and enhancing the foundations and principles of the 2012 guidance, are:

- Subsidiarity and Empowerment
- Collaboration
- Accountability and Responsibility
- Clarity and Equity

These principles reflect the National Improvement Framework aims of excellence through raising attainment and achieving equity. The principles also fully endorse those proposed in the Fair Funding consultation:

- **support excellence and equity** - ensuring every child and young person has the same opportunity to succeed
- **be fair** - placing the needs of all children and young people at the centre
- **be simple**, transparent and predictable – ensuring the costs of delivering education can be easily understood and explained and that schools are able to manage and plan ahead with certainty
- **deliver value for money** – ensuring that every penny spent is used effectively

2. BUDGET OVERVIEW

Please provide in this section an overview of your Education Services' budget, with a statement setting out the basis on which school budgets are constructed. It would be helpful to set this within the context of your wider Local Authority finances.

You may wish to include in this section all disclaimers and information on relevant financial regulations.

It is expected that Published schemes should include the criteria and methodology used to create formulae-based allocations, staffing models and other resource allocations as appropriate (including any formulae applied).

3. AREAS OF EXPENDITURE TO BE DEVOLVED

Please use this section to provide an overview of the areas of expenditure that will be devolved, and those that will not. For example:

Whilst headteachers are given maximum flexibility over their budgets, there are areas of expenditure that are generally not considered suitable for devolution. The reasons for this may include, but are not limited to: areas outside the influence of a headteacher; areas that are too bureaucratic; have unacceptable levels of risk; benefit from economies of scale; require professional expertise; and complex by their nature.

a. Areas identified as not generally suitable for devolving:

- Rent in relation to school premises
- Capital expenditure, including PPP/PFI costs
- Property Insurance
- Non-Domestic Rates
- Statutory Local Authority contracted work on managing the school estate
- Corporate support function costs for example Finance, HR, and Legal functions
- School clothing grants
- Education Maintenance Allowances
- Home to school pupil transport
- Premature retirement costs
- Local Authority Information Management Systems (currently SEEMIS)
- School meals

b. Areas which consultation highlighted as having a variety of approaches, and requiring local determination:

- Waste Collection
- Energy costs
- Carbon charges
- Janitorial and Cleaning staff costs
- Central support services for example Educational Psychology, Quality Improvement Teams, Learning Support and Behavioural Support Teams, Speech and Language Teams, hearing and visually impaired support, dyslexia or significant and enhanced provision for additional support. Each authority will have their own specialist teams which will differ.
- Examination fees
- Long Term Sickness Absence
- Family Leave Costs
- Visiting Teachers
- Music Instructors
- Parent Council expenditure

4. KEY AREAS TO BE COVERED BY SCHEMES

This section covers the 9 key areas covered in Appendix A (i.e. what is Expected and Recommended within schemes).

4. GENERAL INFORMATION ON DEVOLVED SCHOOL MANAGEMENT

4.1 Financial Regulations

Please provide information on how your own Local Authority scheme adheres to financial regulations, delivers best value and ensures the efficient, fair and equitable distribution of resources.

4.2 Best Value Principles

This section can be used to set out the best value principles and Local Authority procurement arrangements headteachers use to deploy the school's budget, and if appropriate, the support and guidance provided from their Local Authority.

4.3 Local Authority Commitment to Devolved School Management

Please use this section to set out your Local Authority's devolution commitment, to empower school leaders to make appropriate, and informed decisions to best meet their local need in line with Local Authority policies, guidance and frameworks.

You may wish to refer back to Section 3 to include areas of resources that are not devolved to schools.

4.4 School Expenditure Within Wider Strategic Planning

This section can be used to set out how headteachers ensure school expenditure is in line with the School Improvement Plan, supporting the relevant Local Authority strategic plans, priorities and the National Improvement Framework.

4.5 Scottish Negotiating Committee for Teachers and Local Negotiating Committees for Teachers Agreements

Please set out how your Local Authorities and headteachers will adhere to SNCT and LNCT agreements and guidance.

PUBLICATION

4.6 Publication Availability

It would be useful to set out here where this resource has been published. Local Authorities are expected to publish the DSM scheme on the external facing website,

and it is recommended that School websites are also utilised and a plain language leaflet/summary is created for stakeholders.

As a reminder, it is expected that published schemes should include the criteria and methodology used to create formulae-based allocations, staffing models and other resource allocations as appropriate. If formulae have been applied, they should be included within the scheme.

TRAINING

4.7 Available Training

Please set out available DSM training opportunities for key staff groups including headteachers, business managers and associated posts. For information, it is recommended that these training opportunities are also made available to depute headteachers, aspiring leaders, elected members and any other appropriate staff who utilise or influence DSM decisions. It is also expected that this training should be available on a frequent and recurring basis, and it is recommended that School leaders have access to local and/or national leadership programmes and training, which ensures an approach to DSM that encourages confident decision-making to promote better outcomes for learners.

Please also set out what will be included in this training. For example, where school or establishment staff have a delegated budget responsibility, they should be aware of the aims and principles associated with DSM, best value and adhere to financial regulations and Local Authority policies for the funds they are responsible for. It is recommended that training should also be available for new and experienced staff members.

CONSULTATION, ENGAGEMENT AND TRANSPARENCY

4.8 Consultation and Engagement

Please use this section to set out the consultation and engagement you have carried out at all levels to inform appropriate resource decisions including: budget, staffing models and savings. This includes consultation on criteria used when determining how a formula is devised or applied and other methodology of distributing resources (if not included elsewhere in your DSM). It would be useful to include all appropriate mechanisms or forums you have created, or that are existing, to aid this process.

Please include reference to consultation and engagement between headteachers and staff groups to inform appropriate resource decisions, and if appropriate, include mechanisms or forums for regular engagement and consultation with staff, parents and wider stakeholders.

For information, it is expected that headteachers should consult with staff, parent councils, pupils and the wider community on appropriate matters, these may include school staffing models, DSM decisions, allocation of departmental or class resources and include formulae or criteria used within the school.

Alongside this it is recommended that headteachers should form appropriate mechanisms or forums for regular engagement and consultation with staff, parents and wider stakeholders as appropriate. Please include this wider information if appropriate.

Lastly, please include information where headteachers share and discuss local school decisions, budget and resource allocations with staff groups and wider stakeholders as appropriate. It is recommended that at school level this includes methodology and distribution of budgets and resources.

4.9 Transparency

Please set out how your Local Authority will make information available to all stakeholders in relation to the Local Authority budget, education budget and delegated budgets to schools, including identifying areas of expenditure that are not devolved to headteachers.

It would be useful to include any potential financial assistance, discounts or exemptions available, for example in relation to pupils in receipt of free school meals, should be included within this information.

Headteachers are to ensure that any costs related to the curriculum are minimised to ensure equality of access. It is recommended that where charges exist for pupils, including both curriculum or extra-curricular activities (class materials, school trips, school uniform, etc) they should be clearly detailed in school information published at the start of the academic session.

For information it is expected that DSM schemes, and information published for stakeholders is accessible and is in plain language.

COLLABORATION

4.10 Local Priorities

Please list your local priorities e.g. from your Corporate Plan, Children's Services Plan, Local Outcome Improvement Plan, that will be taken into account as part of your DSM to set out your commitment to partnership working between schools and other agencies and stakeholders.

Please also include due regard to Getting it Right for Every Child (GIRFEC) and the role of your Local Authority as a corporate parent. If you have considered empowerment on an area or school cluster basis, enabling headteachers to influence decisions across geographic areas or school clusters, it would be useful to include this.

For information, it is expected that headteachers are collaborative and collegiate in their approach, challenging themselves and stakeholders to be solution focused embracing joint working with the learning community, parents, children and young people, teachers and support staff, partners, other schools and the Local Authority. It

is recommended that headteachers work together to share and maximise resources to influence outcomes across geographical areas or school clusters.

STAFFING

4.11 Staffing Structures

Please set out how headteachers have been involved in designing a staffing structure to suit the school's context within their delegated budget and in accordance with SNCT and LNCT agreements and guidelines. It is recommended that Local Authorities consider how they approach the devolution of staffing, and should include discussing with headteachers the complexities and risks associated with staffing allocations.

4.12 Legislative and Contractual Requirements

You may wish to include how legislative and contractual requirements are met and local circumstances and need are taken into account.

4.13 Staff Resource

It is expected that headteachers should play an active role in designing and reviewing recruitment and staffing approaches, both for their own school/s and for the Local Authority. For information, on all staffing matters, headteachers must adhere to the appropriate legislation and Local Authority, SNCT and LNCT agreements and guidelines. Headteachers should also be consulted on the allocation of support staff to schools.

PROFESSIONAL SUPPORT

4.14 Professional Support teams, functions and transparency

Please set out the professional support team information that headteachers in all schools have access to and their functions. There should be transparency in any formulae or methodology used when allocating professional support to schools.

ACCOUNTING

4.15 Budget underspend / overspend

Please set out your agreed and published Local Authority Policy and Criteria in respect to the provision to carry forward budget underspend or overspend. It is recommended that intended use of carry forward of budget underspends are identified in School Improvement Plans or school budget spending plans.

If possible, please include the procedures for managing carry forward of overspends and the consideration given towards enabling schools to deposit funds to save budget for planned and agreed future spend.

4.16 Virement

Please set out the provision available to headteachers to vire budget between budget headings in line with agreed and published Local Authority policy and criteria.

SCHEME REVIEW

4.17 Review, methodology and Stakeholders

Please set out your methodology for reviewing your scheme. For information it is expected that this is undertaken every three years with stakeholders and a peer Local Authority that you have determined appropriate e.g. a neighbouring Local Authority, one with similar characteristics, or one who may be part of the same Regional Improvement Collaborative.

Stakeholders may include headteachers, business managers, all staff groups, trade unions, parents, pupils and corporate teams such as finance, human resources and procurement as examples. Local Authorities are recommended, as part of ongoing self-evaluation, to update DSM schemes if changes are made e.g. to Local Authority budget or budget setting, which have a consequential impact on a scheme.

APPENDICES

You may wish to include your own appendices, for example: budget statements and pupil rolls, expenditure records, staffing budgets, ad-hoc adjustments, policy on virement and carry forward, schemes of delegation and financial regulations; Key dates; Roles and responsibilities (authority, directorate, managers, headteachers) etc.

Appendix A: Expected and Recommended Summary

These guidelines recognise that in relation to DSM the functions and roles undertaken within an empowered school system are not restricted to headteachers. Although the role of headteacher is identified throughout, shared and distributed leadership means that other staff members or groups may undertake an area or aspect of DSM. The guidelines support distributed leadership, collaboration and consultation whilst recognising that the accountability and responsibility will reside with the headteacher as the leader of their school, supported by the Local Authority.

In some cases the guidelines note statutory requirements on Local Authorities. For the avoidance of doubt, nothing in these guidelines detracts from those statutory requirements, which all Local Authorities must comply with.

General	
Expected	Recommended
Local Authorities schemes adhere to financial regulations, deliver best value and ensure the efficient, fair and equitable distribution of resources.	
Headteachers deploy the school's budget in accordance with best value principles and Local Authority procurement arrangements, with appropriate support and guidance from their Local Authority.	
Local Authorities should ensure that devolution is meaningful and empowers school leaders to make appropriate, and informed decisions to best meet their local need in line with legislation and Local Authority policies, guidance and frameworks.	Local Authorities scheme clearly define areas of resources that are not devolved to schools.
Headteachers are expected to ensure school expenditure is in line with the School Improvement Plan supporting the relevant Local Authority strategic plans, priorities and the National Improvement Framework.	
Local Authorities and headteachers must adhere to legislative requirements, SNCT and LNCT agreements and guidance.	

Format and Publication	
Expected	Recommended
	Local Authorities are strongly encouraged to utilise the format of the DSM Framework for their scheme. This is available from https://www.gov.scot/policies/schools/devolved-school-management/ .
Local Authorities are expected to publish the DSM scheme on the external facing website.	Where a school has a website, it is recommended that it should include a web link to the Local Authority published scheme.
	Local Authorities should consider publishing a summary of the authority's scheme, providing stakeholders summary information in an accessible way, using plain language.
Published schemes should include the criteria and methodology used to create formulae-based allocations, staffing models and other resource allocations as appropriate. If formulae have been applied, the formulae should be included within the scheme.	
Training	
Expected	Recommended
Local Authorities should provide specific DSM training to key staff groups including headteachers and Business Managers or associated posts.	It is recommended that training opportunities are made available to depute headteachers, aspiring leaders, elected members, and any other appropriate staff who utilise or influence DSM decisions.
Where school or establishment staff have a delegated budget responsibility they should be aware of the aims and principles associated with DSM, best value and adhere to financial regulations and Local Authority policies for the funds they are responsible for.	Training should be available for new and experienced staff members.
Training should be available on a frequent and recurring basis.	School leaders have access to local and/or national leadership programmes and training which ensures an approach to DSM that encourages confident decision-making to promote better outcomes for learners.

Consultation, Engagement and Transparency	
Expected	Recommended
Consultation and engagement at all levels between Local Authorities, headteachers and stakeholders should take place to inform appropriate resource decisions, including: budget, staffing models and savings. This includes consultation on criteria used when determining how a formula is devised or applied and other methodology of distributing resources.	
Local Authorities should form appropriate mechanisms or forums for regular engagement and consultation with headteachers and wider stakeholders as appropriate.	
Consultation and engagement between headteachers and staff groups should take place to inform appropriate resource decisions, including: budget, staffing models, department budget allocations and savings.	Headteachers should form appropriate mechanisms or forums for regular engagement and consultation with staff, parents and wider stakeholders as appropriate.
Headteachers should consult with staff, parent councils, pupils and the wider community on appropriate matters, these may include school staffing models, DSM decisions, allocation of departmental or class resources and include formulae or criteria used within the school.	
Headteachers share and discuss local school decisions, budget and resource allocations with staff groups and wider stakeholders as appropriate.	It is recommended that at school level this includes methodology and distribution of budgets and resources.
Local Authorities make information available to all stakeholders in relation to the Local Authority budget, education budget and delegated budgets to schools, including identifying areas of expenditure that are not devolved to headteachers.	
It is expected that DSM schemes, and information published for stakeholders is accessible and is in plain language.	

Headteachers are to ensure that any costs related to the curriculum are minimised to ensure equality of access.	Where charges exist for pupils, including both curriculum or extra-curricular activities (class materials, school trips, school uniform, etc.) they should be clearly detailed in school information published at the start of the academic session.
	Any potential financial assistance, discounts or exemptions available, for example in relation to pupils in receipt of free school meals, should be included within this information.

Collaboration

Expected	Recommended
DSM schemes should be informed by local priorities to enable it to contribute towards shared agendas and improved outcomes, it should enable stronger partnership working between schools and other agencies and stakeholders.	
Local Authority decisions about education spending are made in a collegiate and transparent way paying due regard to Getting it Right for Every Child (GIRFEC) and the role of Local Authorities as Corporate Parents.	It is recommended that Local Authorities consider empowerment on an area or school cluster basis, enabling headteachers to influence decisions across geographical areas or school clusters.
Headteacher are expected to be collaborative and collegiate in their approach, challenging themselves and stakeholders to be solution focused embracing joint working with the learning community, parents, children and young people, teachers and support staff, partners, other schools and the Local Authority.	It is recommended that headteachers work together to share and maximise resources to influence outcomes across geographical areas or school clusters.

Staffing

Expected	Recommended
Local Authorities should empower headteachers to design a staffing structure to suit the school's context within their delegated budget and in accordance with SNCT and LNCT agreements and guidelines.	Local Authorities consider their approach when devolving staffing, this includes discussing with Headteachers the complexities and risks associated with staffing allocations.

Schemes should seek to devolve the appropriate resources to schools, whilst ensuring that legislative and contractual requirements are met and local circumstances and need taken into account.	
The Local Authority, with headteachers will seek to deliver the most appropriate and efficient use of staff resource ensuring equity, transparency and clarity whilst promoting and supporting collaboration and collegiate working.	
Headteachers should play an active role in designing and reviewing recruitment and staffing approaches, both for their own school/s and for the Local Authority.	
For all staffing matters, headteachers must adhere to the appropriate legislation and Local Authority, SNCT and LNCT agreements and guidelines.	
Headteachers should be consulted on the allocation of support staff to schools.	
Professional Support	
Expected	Recommended
Headteachers in all schools should have access to professional support teams and functions.	
There should be transparency in the formulae or methodology in allocating professional support to schools.	
Accounting	
Expected	Recommended
Headteachers should have the provision to carry forward budget underspend or overspend in line with agreed and published Local Authority policy and criteria.	Intended use of carry forward of budget underspends are identified in School Improvement Plans or school budget spending plans.
	Procedures for managing carry forward of overspends are included within the scheme.

	Consideration is given towards enabling schools to deposit funds to save budget for planned and agreed future spend.
Headteachers should have the provision to vire budget between budget headings in line with agreed and published Local Authority policy and criteria.	
Scheme Review	
Expected	Recommended
Local Authorities undertake a three-year review with stakeholders and a peer Local Authority as they determine appropriate.	Stakeholders may include headteachers, business managers, all staff groups, trade unions, parents, pupils and corporate partners such as finance, human resources and procurement as examples.
	Local Authorities are recommended, as part of ongoing self-evaluation, to update DSM schemes if changes are made which have a consequential impact on a scheme.
	<p>Headteachers are recommended to apply national standards and to undertake self-evaluation drawing upon the most appropriate, and current tools, at date of publication these include, but are not limited to:</p> <p>Education Scotland - HGIOS4 QI 1.5 Management of Resources</p> <p>GTC Scotland - The Standards for Leadership and Management: supporting leadership and management development</p> <p>Scottish Government and COSLA – Education Reform Joint Agreement and Headteachers' Charter</p>

APPENDIX B

RECOMMENDED INFORMATION TO INCLUDE IN A PLAIN LANGUAGE SUMMARY/LEAFLET

Please find below a list of recommended information to include in a plain language leaflet, or information sheet:

- A breakdown of your Local Authority budget and an indication of the Education allocation within this;
- Further to this headline information, a breakdown of this Education allocation;
- A link to where your DSM scheme can be found publicly, be this from your website or hard copies if applicable;
- A short overview of what the Local Authority and Headteachers are responsible for, to demonstrate there are devolved areas;
- Contact details or information on how parents, or stakeholders can comment or find additional information at a Local Authority level;
- A headline summary of key points in the DSM;
- Narrative on staffing, pupil levels, or geographic context if applicable.

North Lanarkshire Council Report

Education, Children and Families Committee

Does this report require to be approved? ☐ Yes ☒ No

Ref JMcP/ MO'H

Date 20/05/25

Proposed Strategic Equity Fund Operating Model

From James McParland, Chief Officer (Education South)

E-mail McParlandJam@northlan.gov.uk **Telephone**

Executive Summary

The Scottish Attainment Challenge (SAC) aims to raise the attainment of children and young people living in deprived areas, to close the equity gap.

In November 2021, the Cabinet Secretary for Education and Skills announced plans for the Scottish Attainment Challenge (SAC) for 2022/23 to 2025/26. Details of this refresh can be found on the [Scottish Government website](#).

Notably, the plan outlined a reconfigured model through which all local authorities would benefit from a new funding model, referred to as Scottish Equity Fund (SEF). As part of this new funding model, the funding provided by Scottish Government to North Lanarkshire Council was reducing by circa £3,000,000 between 2023 and 2026.

Recently, the Cabinet Secretary announced a potential 1-year extension of SAC funding into the 2026-27 session. This could mean that NL receives £3,383,214 in SEF funding, and schools retain their PEF allocation for another year. However, a change in government could affect this, and until written confirmation is received, planning for funding cessation in March 2026 continues.

To enable the Service to manage this reduction effectively, reducing risk to the Council and maximising benefits for learners, a core programme of activity worth circa £3 million was approved by SLT in (February 2023). This protected a core programme of activity and allowed the tapering to be managed effectively through reductions to funding/resources out with the core model.

This report provides an update on the impact of the use of the allocated funding for session 2024-25 and outlines proposals for a new operating model for session 2025-26. Full details of the proposed plan for the final academic session 2025-26, is outlined in Appendix 1.

The Service recognises the need to manage this reduction effectively to reduce risk to the Council and to continue to prepare for the end of the additional funding allocation in financial session 2025-26. Considering the associated risks and potential impact on service delivery and outcomes for learners, this has been included in the corporate risk register.

Recommendations

It is recommended that the Committee:

- (1) Consider the report, noting financial implications;
- (2) Note the service's approach to mitigate the risks associated with the cessation of SAC funding.

The Plan for North Lanarkshire

Priority	Support all children and young people to realise their full potential
Ambition statement	(6) Raise attainment and skills for learning, life, and work to enhance opportunities and choices
Programme of Work	Brighter Futures

1. Background

- 1.1 Scottish Attainment Challenge planning guidance states that local authorities should consider the totality of Attainment Scotland Funding (Strategic Equity Funding (SEF), Pupil Equity Funding (PEF) and Care Experienced Children and Young People (CECYP) funding, working collaboratively with headteachers, senior leaders and other partners to identify how the funding is best utilised to enhance local plans to tackle the poverty-related attainment gap and contribute to the mission of the Scottish Attainment Challenge. It emphasises that Strategic Equity Funding must be used to deliver targeted activities, approaches or resources which are clearly additional to universal local improvement plans. The table below outlines the totality of North Lanarkshire's SAC funding for session 2025-26.

Scottish Attainment Challenge – Attainment Scotland Fund (2025-26)		
Scottish Equity Funding (SEF) £3,383,214	Pupil Equity Funding (PEF) £9,678,420	Care Experienced Children and Young People (CECYP) £595,350

- 1.2 Within the reconfigured SEF funding allocation model, North Lanarkshire's funding has reduced by circa £7.5 million in 2021 – 2022 to £3.5 million in 2025 - 2026. Under this tapering arrangement, £1 million of funding has been removed each year, as detailed in the table below. To date, no further information has been provided by the Scottish Government advising if any future funding will be provided and therefore the Service are continuing to plan on the premise that there will be no additional funding available.

Local Authority	2022/2023	2023/2024	2024/2025	2025/2026	Confirmed - End of SAC
North Lanarkshire	£6,454,948	£5,431,037	£4,407,126	£3,383,214	£0.00

- 1.3 At a meeting on the 26th of March 2025, the Cabinet Secretary commented that the SEF, PEF and CEYP funding will continue into session 2026-27 (this is a 1-year extension). This means that NL could potentially receive £3,383,214 SEF funding in line with this year's allocation. Furthermore, schools will potentially retain their existing PEF allocation for another year – until 2026-27. It is worth noting that a change of

Government could impact on this, however, it is more positive than we originally thought. However, until the service receives written confirmation of this extension, they are continuing to plan for cessation of funding in March 2026.

- 1.4 Regardless of end date, to enable the Service to manage this reduction effectively, maximising benefits for children and families, the service developed a reconfigured Scottish Equity Fund (SEF) core plan worth circa £3 million. This core plan was designed to strengthen the work of the service overall, in line with One Plan and NL's Programme of Work, aligning roles and protecting a core programme of activity to support sustainable approaches to improvement. The plan reflects national recommendations and centres around the Scottish Attainment Challenge organisers: learning and teaching; leadership; and families and communities. This core plan was approved at SLT in February 2023. If additional funding becomes available, where practicable and appropriate, the model will be extended and implemented into session 2026-27.
- 1.5 To date, the service has sought to protect the core model by managing the reduction through the tapering of additionality provided by resources or supports funded by remaining funds out with the 3 million for the core model, as illustrated below. Approval is sought on the best use of this 'additional' allocation, annually. However, for session 2025-26, there are **no additional funds** out with the core model and therefore a robust evaluation of all aspects of the SEF plan was undertaken to create the SEF model for the final confirmed year of SEF allocation.

Local Authority	2022/2023	2023/2024	2024/2025	2025/2026
North Lanarkshire Total Allocation	£6,454,948	£5,431,037	£4,407,126	£3,383,214
Allocation for core model (circa)	£3,000,000	£3,000,000	£3,000,000	£3,000,000
Remaining allocation to provide further support	£3,454,948	£2,431,037	£1,407,126	£383,214

- 1.6 At this point, Scottish Government has not formally confirmed in writing any plans to extend or replace SAC funding (SEF/PEF/CECYP) beyond this parliamentary period, therefore, at this juncture, the service is planning on the basis that there will be no additional SAC funding after March 2026. Therefore, the service plan to manage the final allocation effectively, using a planned carry forward (April 2026-June 2026) to enable them to create a plan that aligns to the academic school session.
- 1.7 Taking cognisance of the information above, this report outlines our proposal for further adaptations to the core plan for session 2025-26, the final year of confirmed SEF funding. It also outlines progress made during session 2023-24 (last full session) and mid-term progress for session 2024-2025. It illustrates how we have used our service self-evaluation evidence to identify key priority areas, to support continuous improvement.
- 1.8 Notably, we have made it a priority to safeguard essential elements of integrated working within our core plan. This ensures that children, young people, and families receive the appropriate support at the right time within their local communities, placing children at the centre of our planning processes. This strategy enables us to optimise the use of available resources, adopting a holistic approach to all available funding, with a focus on enhancing outcomes for families.

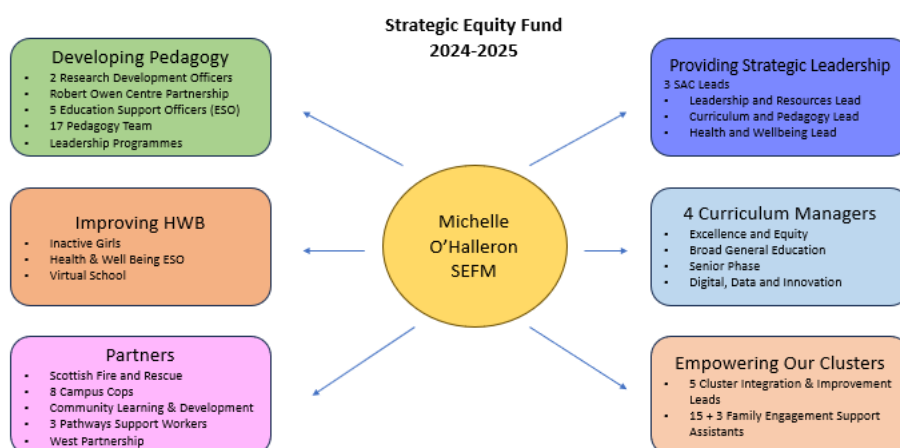
2 Report

SEF Core Model 2024-2025

- 2.1 To maximise the benefits of SEF funding and to ensure any future tapering was managed effectively, a core model was created costing circa £3 million. The model was designed to strengthen the strategic efficacy and purchase of the Education and Families Manager team and to support achievement of service improvement priorities.
- 2.2 In session 2024-25, SEF expenditure centred around four strategic workstreams, as outlined below. By aligning these workstreams to NL's stretch aims and identifying clear measures and outcomes, we were able to track our progress. These workstreams will continue to be the focus in session 2025-26.

Improving leadership	Improving standards across our schools and centres	Improving wellbeing and ensuring children and young people thrive	Supporting families through effective partnership working
<ul style="list-style-type: none"> Building staff capacity Empowering local decision making Deploying resources to those in most need Developing systems that support effective data driven improvement 	<ul style="list-style-type: none"> Raising attainment and closing the gap Improving learning and teaching Improving curricular progression Improving routes to achievement and employability Improving outcomes from inspection 	<ul style="list-style-type: none"> Improved engagement of most vulnerable groups Improved balance of care Improving mental health Reducing the impact of trauma Improving the impact of GIRFEC Improving attendance Reducing exclusion 	<ul style="list-style-type: none"> Strengthening Whole Family Support, incl. kinship carers and adopters. Protecting children (Signs of Safety and Contextual Safeguarding) Tackling Poverty and access to economic opportunities Improving support to care experienced young people

- 2.3 The diagram below illustrates key operational aspects of improvement work supported through the 2024-25 SEF core model.



- 2.4 A detailed summary of expected spends against the core model is included in Appendix 1. This will potentially result in a carry forward of approximately £900,000 from session's 2024-25 allocation, to be used from April- August 2025. This will be needed for the remainder of the academic session, but it falls under financial session 2025-26, so the

service sought and received SG approval. (Please note that final carry forward figures may vary after final year end calculations.)

- 2.5 These savings will be carried forward into session 2025-26 and used to minimise the impact of the reductions. With support from our colleagues in the budget unit, we have also managed to re-align some of the costs, to allow us to maximise our carry forward for session 2025-26 to allow us to continue to deliver some of the targeted interventions.
- 2.6 In line with agreed reporting procedures, the following sections exemplify some of the key impacts of the core model during session 2023-24 (the last full reporting session). It also highlights how the model has evolved to further extend good progress into session 2024-25.

Learning Hub Update

- 2.7 As noted in the diagram in section 2.3, specific emphasis was placed on identifying and deploying resources to build overall staff capacity and to support schools and clusters to raise attainment through improved pedagogical approaches and classroom practice. These resources included:
- Education Support Officers (ESOs) to lead pedagogical developments in key areas such as Literacy, Numeracy and Health and Wellbeing.
 - An enhanced Pedagogy Team (August 2024 to June 2025) to provide direct support to schools by modelling effective classroom practice to build staff capacity.
- 2.8 The Education Support Officers (ESOs), based within the Learning Hub at Noble Primary, are responsible for all continuous lifelong professional learning (CLPL) in relation to literacy, numeracy, learning, teaching and assessment and STEM. This ensures teaching staff are kept abreast of the best research based pedagogical approaches.
- 2.9 During session 2023-2024, the Literacy ESO:
- Delivered literacy training (CLPL) to 850 practitioners to ensure practitioners are aware of the latest research-based teaching approaches,
 - Delivered monitoring and tracking training to 77 senior leaders to enhance their ability to quality assure approaches to literacy across their school,
 - Worked with Literacy Coaches from 75% of establishments to ensure that key messages relating to research and pedagogical approaches are delivered to most establishments,
 - Delivered 47 bespoke training sessions that were customised according to school priorities and staff development needs,
 - Delivered wider training to the Virtual School, Cluster Attainment Teachers, Community Learning and Development (CLD), Children's House staff, SDS and parent workshops. This ensures a consistent approach from wider staff teams when supporting children and young people,
 - Delivered training to two other local authorities (Midlothian and West Lothian).
- 2.10 During session 2023-2024, the Numeracy ESO:

- Delivered core numeracy CLPL to 700 practitioners, and bespoke CLPL to 408 practitioners to ensure practitioners are aware of the latest research-based teaching approaches,
- Delivered monitoring and tracking training to 50 senior leaders and 30 validated self-evaluation (VSE) Champions to support consistent understanding and expectations during VSE visits,
- Worked with Numeracy Coaches from 64% of primary schools, to ensure that key messages relating to research and pedagogical approaches are delivered to most establishments,
- Delivered 40 whole school engagements across Primary, Secondary and ASN settings, covering early to third level numeracy. This has improved consistency in approach in relation to best practice.

2.11 During session 2023-2024, the Learning, Teaching and Assessment (LTA) ESO:

- Delivered LTA CLPL to 1223 practitioners,
- Delivered monitoring and tracking training to 27 senior leaders,
- Worked with 75% of Primary, and 78% of Secondary schools at Assessment and Moderation Lead (AML) sessions,
- Worked with 21 participants of Cohort 2 of Improving our Classrooms, and 3 schools in cohort 1 of 'Improving our Departments'; a West Partnership learning opportunity. All the ongoing work in relation to learning, teaching and assessment has improved teachers' confidence when assessing levels and has improved classroom practice which in turn will improve outcomes for learners.

2.12 During session 2023-2024, the Science, Technology, Engineering and Maths (STEM) ESO:

- Delivered STEM CLPL to 689 practitioners,
- Worked with 2013 pupils, delivering high-quality, engaging STEM lessons,
- Delivered 209 pedagogy workshops,
- Worked with 8917 pupils via partnership engagements.

This CLPL and exemplification is improving practitioner confidence when teaching STEM and has improved pupil engagement levels.

2.13 In addition to the universal training noted above, the ESOs delivered CLPL in relation to literacy and numeracy interventions and assessments. Furthermore, they continue to work on developments such as a non-fiction reading pilot; this pilot promotes a new interdisciplinary approach to non-fiction literacy with the aim of raising attainment. It takes cognisance of the recommendation within the Muir report, which states, "*All learners have an entitlement to Learning for Sustainability (LfS): a cross-curricular approach that weaves together distinct but closely related themes of sustainable development education, climate education, global citizenship, children's rights and outdoor learning.*" (Muir, 2022)

2.14 During session 2024-25, we have significantly expanded the reach and impact of literacy and numeracy professional learning through the removal of costs to all establishments wishing to undertake training. Core literacy and numeracy sessions have been repeated in term two to meet demand, and some literacy sessions will be offered out for a third time in term three due to waiting lists. This exemplifies the value placed on this training by head teachers and staff alike.

- 2.15 The Learning Hub continues to demonstrate its commitment to partnership and collaborative approaches. Most recently, they have worked alongside practitioners, Education Scotland and educational psychologists to develop new dyscalculia guidance. This will be launched and rolled out in the current academic session.

Pedagogy Team

- 2.16 The Pedagogy Team were deployed at universal level to model best practice in literacy and numeracy within primary classrooms. They also provided additional and intensive level support to establishments and staff where self-evaluation results indicated further support was required to secure identified improvements.
- 2.17 During session 2023-2024. In total, they worked with 101 classes, 105 practitioners and 1990 children. Notably, on average, over one third of the children they worked with live in Quintile 1 (most deprived area).
- 2.18 The capacity of the pedagogy team was enhanced during session 2024-25 by the creation of new pedagogy principal teacher roles. From August 2024, the team increased to 5.6 FTE principal teachers and 11.4 FTE class teachers. This increase in capacity has been used to increase the provision of direct support for establishments on a data-informed, needs basis. So far this session, the team has worked intensively with 22 schools, 98 class teachers, across 94 classes and 2326 learners from P1 to P7 to model best practice in pedagogical approaches in literacy and numeracy. All staff stated that they benefited from input from the team, reporting improvements to their skillset and confidence, particularly in teaching literacy.

Leadership Update

- 2.19 North Lanarkshire developed a suite of leadership programmes in 2019, and these continue to attract colleagues from across Scotland. During session 2023-24, 51 participants enrolled on the Principal Teacher Leadership Programme, 37 on the Depute Head Teacher programme, and 7 on the Head Teacher programme. 17% of participants overall joined from other local authorities out with North Lanarkshire.
- 2.20 During session 2024-25, 55 participants registered for the Principal Teacher programme, 34 participants for the Depute Head Teacher programme, and 24 for the Head Teacher programme. This includes participants from 14 Local Authorities, as well as North Lanarkshire colleagues, again exemplifying the quality of the leadership opportunities provided by North Lanarkshire.
- 2.21 There is a cost associated with participation in our leadership programmes with each participant paying £250 for their respective programme. For session 2023-24 (last full session), the total income generation for all leadership programmes (including early years, digital and LTA) amounted to £49,250. The predicted income from all leadership programmes for session 2024-2025 is £46,750.

HWB: Roadmap to Recovery

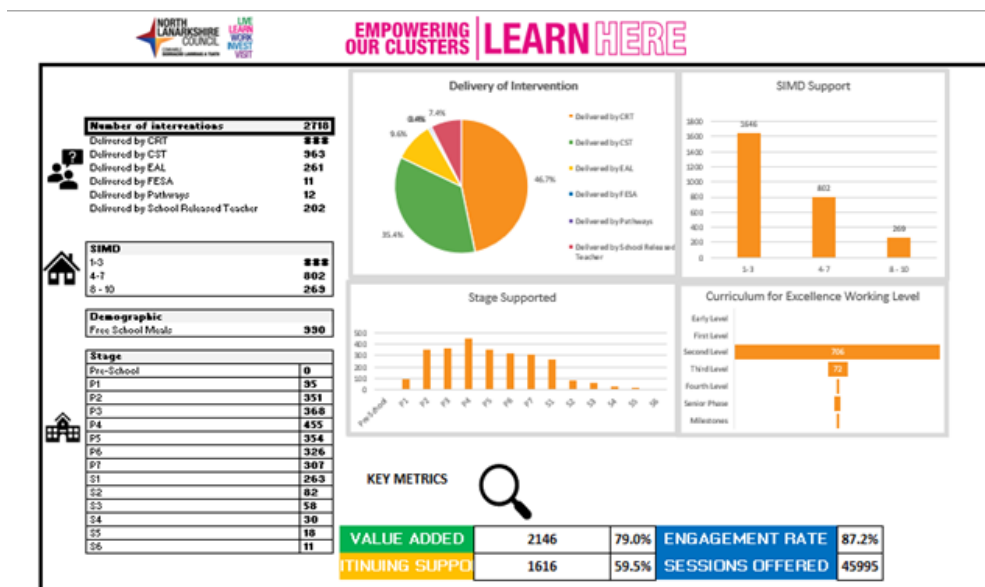
- 2.22 Data gathered from the strengths and difficulties questionnaire (SDQ) has been synthesised and important correlations have been identified between difficulties in health and wellbeing, attainment and attendance. As a result, the service has

introduced monthly attendance monitoring procedures that support early identification and intervention, at establishment and cluster level. The service has also joined a national group, led by Education Scotland, which is focusing on sharing good practice on improving attendance, as it is recognised that this is a national issue.

- 2.23 As part of the Empowering Clusters model colleagues from Community Learning and Development (CLD) have continued to offer a range of family learning and parental engagement opportunities, with demand for services remaining high. For example, between 1st April 2024 and the 30th of June 2024, over 1000 distinct learners attended either a family learning or parental engagement project. This has impacted positively on family relationships, confidence and engagement.
- 2.24 Feedback from colleagues in CLD and local data, highlight an increasing trend in referrals for support from families with children with identified additional support needs, or with children who are awaiting identification. In response to this shift in demand, the CLD Family Learning team has developed their approaches as exemplified below:
- Staff have undertaken additional training to address complex issues: such as Sleep Action and Solihull understanding your child's behaviour, LIAM, Autism and Neurodiversity Training.
 - Extended partnership working with a range of other agencies (e.g., HOPE for Autism, The Disability Forum, Early Intervention CAMHS, Neurodevelopment Service for Children and Young people, Education) to effectively support and signpost families to ensure that they are receiving the right support at the right time.
 - Modified and developed new and existing programmes to meet the evolving needs and to support inclusive practice e.g. Mood for Food and ASN support groups for parents. The training undertaken by CLD staff has built staff capacity and confidence in supporting children, young people and families. It has also enhanced their ability to provide further, bespoke support to families most in need.
- 2.25 A next step identified as part of ongoing work in relation to the Roadmap to Recovery, Part 2, is the need for health and wellbeing curriculum progressive pathways. This will strengthen universal curriculum provision across establishments and provide better consistency. Work is already underway to progress this.

Empowering Clusters

- 2.26 The Empowering Cluster tracking system was revised in August 2024 to improve functionality and to incorporate a range of data to support planning for continuous improvement. Using the new system, data will be captured three times per year to track progress and support planning for continuous improvement. The new system offers an automatic data analysis tool, as shown below, which can be used by Cluster Improvement and Integration Leads (CIILs) and Cluster Chairs to inform next steps and the strategic deployment of resources. This feature supports the ongoing cycle of planning, monitoring, and evaluating progress. The service is currently exploring the potential for integrating this into the service dashboard using Power BI.



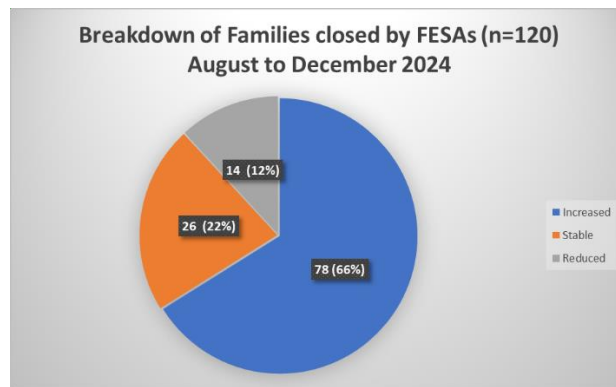
2.27 Initial interim data collected indicates that a total of 1,834 individual supports have been provided, at an additional level, through cluster teams between September and December 2024.

Role	Literacy Supports	H&WB Supports	Numeracy Supports
Cluster Resource Teacher (CRT)	753	79	242
Cluster Support Teacher (CST)	455	173	132
Grand Total	1208	252	374

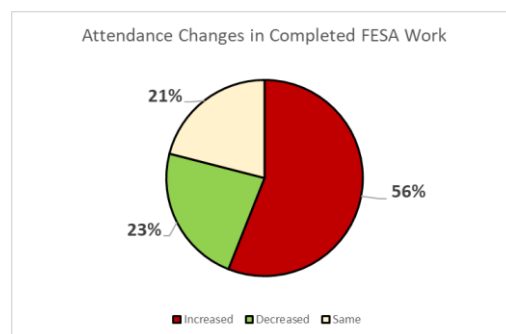
Partnership Working

Family Engagement Support Workers

- 2.28 Scottish Equity Funding has been used to invest in Family Engagement Support Assistants (FESAs). FESAs provide bespoke, family centred, support where there is a concern about school attendance. There are currently circa 15 FESAs working across the school clusters. This again reflects the changing demands placed on services to provide bespoke support in response to local needs.
- 2.29 This approach prioritises families living in SIMD 1 and 2. During session 2023/24, the FESAs completed work with 192 children and their families, offering practical supports with establishing routines and signposting families to agencies who can provide support such as the Tackling Poverty Team and Mental Health Services. They aid and support communication between families and schools.
- 2.30 From August to December 2024, FESAs worked in all 15 clusters. During this period, staff worked with 547 children and completed work with 120. Attendance outcomes are illustrated in the chart below:



- 2.31 As illustrated below, attendance improved for 56% of young people supported by FESAs. Evaluation evidence shows that the impact is greater within the primary sector for young people whose attendance is between 30-60%. Furthermore, evaluations show that the most common themes impacting on attendance are poverty (cost of school day); parental mental health and communication/engagement with schools.



- 2.32 As the data illustrates, earlier identification and intervention, both in terms of age and attendance level, is crucial to improving attendance levels and maximising the impact of the interventions led by FESA.

Campus Police Officers

- 2.33 There are currently 8 campus officers deployed across 12 secondary schools in North Lanarkshire as a partnership arrangement with Police Scotland, funded through SEF.
- 2.34 To date, individual establishments create their own workplan with associated measures for officers however, next session, new processes will be introduced which will allow for more robust data collection and clearer reporting of impact. Simultaneously, the campus officer remit will be refined to target support around key areas such as strengthening the health and wellbeing curriculum offer and providing intensive support to young people at risk of, or currently, in conflict with the law. The aim of this is to help build positive relationships and intervene at an early stage to avoid any escalation of behaviours.

Pupil Equity Funding

- 2.35 Local Authority Pupil Equity Fund (PEF) guidance and quality assurance approaches were updated for session 2024-25 to create more robust support and challenge for establishments in their planning. This guidance has been well received by establishment heads and senior leaders and is helping to reduce bureaucracy and

promote outcome-based PEF planning with a focus on improving outcomes for children and young people most affected by poverty.

- 2.36 PEF sampling continues, which involves school visits by NL's Attainment Advisor and SAC Curriculum Manager. This has improved our capacity to evaluate the impact of PEF on outcomes for children more effectively. These improvements were further scrutinised when identified establishments were visited by Scottish Government ministers, as part of their sampling and quality assurance processes, and feedback was positive.
- 2.37 Notably, during session 2023-2024, three North Lanarkshire establishments were identified (20% of establishments inspected) by HMIE as having practice worth sharing, nationally. These establishments are Stane Primary School for their innovative and impactful use of Pupil Equity funding; St Ignatius Primary School for innovative approaches to learning, teaching and assessment, and alternative curriculum offerings, and Firpark Primary School, for effective partnership working with parent council and families.
- 2.38 Furthermore, a sharing good practice network has been established to support senior leaders in driving the equity agenda within schools. The main objectives of the network meetings are to provide updates on local and national policy, facilitate collaborative planning and share effective practice across the local authority.

Participatory Budgeting

- 2.39 The Local Authority's tackling poverty team continues to collaborate with schools to complete the 'three questions' evaluation. This initiative involves collaborating with parents, staff and pupils to identify common themes related to the impact of the cost-of-living crisis and the cost of the school day. Currently, six schools are piloting participatory budgeting approaches through PEF. Based on feedback and lessons learned, this approach will be expanded throughout this session to support schools in addressing common issues identified through the 'three questions' evaluation process. As a result of this work, the service is working with a range of partners to refresh and update approaches to teaching financial education to ensure it meets the needs of all children and young people.
- 2.40 In March 2024, nine Additional Support Needs (ASN) schools collaboratively used PEF funding to allow a dedicated Welfare Rights Officer to be employed on a temporary basis (August 24 to June 25) to provide an income maximisation service to the families of students attending these schools.
- 2.41 The Welfare Rights Officer collaborated with establishment head teachers to agree the most appropriate delivery model, for their context. Most schools within the pilot opted to use a targeted approach, where the details of P1 and S1 pupils were provided to the welfare rights officer, who then made direct contact with the families to discuss income maximisation.
- 2.42 To date, the total income generated for identified families, through this targeted approach, is £116,367, with a further 49 claims awaiting an outcome.
- 2.43 The Tackling Poverty team aims to leverage the success of this pilot by continuing to work closely with colleagues to create a sustainable model for service design and delivery. This model will support efforts to reduce child poverty and enhance family well-being.

Care Experienced / Virtual School

- 2.44 In addition to SEF funding, every local authority also benefits from the Care Experienced Young People (CEYP) Fund. This has also been reducing, as detailed in the table below. Unlike SEF and PEF, CEYP is funded across an academic session, and at this point, we do not have any information beyond 2024-2025.

Academic Session	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
CEYP Fund	£619,200	£712,800	£652,800	£591,675	£559,825	£595, 350

- 2.45 NL has made effective use of the CEYP Fund to create a Virtual School team. The team consists of a Virtual School Lead, support workers, support assistants, and a learner journey pathways coordinator.
- 2.46 During session 2023-24, the Virtual School team worked with Education Scotland to create a Keeping the Promise award. During session 2024-25, Virtual school staff have delivered information sessions about the award to Cluster Chairs, central team officers, head teachers and other relevant staff.
- 2.47 The table below highlights the number of establishments who have included this as a main priority within their improvement plan for session 2024-25.

School Type	Total Number of Schools	Number of schools with 'Keeping The Promise' on improvement plan	Percentage of schools with 'Keeping The Promise' on improvement plan (%)
Primary	118	73	62
Secondary	23	11	48
ASN	14	4	29

- 2.48 Furthermore, to increase opportunities and support for care experienced children and young people to achieve more formal national qualifications in the senior phase, enhanced teacher allocation is now in place, funded through SEF, and this is contributing to increased opportunities for learners. 27 young people were supported in session 2023/24 to achieve 88 National 3 or 4 qualifications across eight curricular areas. The impact of this can be seen below:
- 17/27 achieved three or more national qualifications - 63%
 - 10/27 achieved four or more national qualifications - 37%
 - 5/27 achieved five or more national qualifications - 19%
 - 25/27 achieved a national qualification in English – 93%
 - 25/27 achieved a national qualification in Maths – 93%
 - 6/27 achieved N4 English – 22%
 - 7/27 achieved N4 Maths – 26%
 - 9/27 achieved N4 English and N4 Maths – 33%
- 2.49 A virtual school improvement priority has been agreed for session 2024-25 which sets a target of 60% of S4 learners working entirely with the virtual school achieving a minimum of five full SQA course awards. Levels of direct teacher support have been

increased for this target group. 72% of this group are currently on track to achieve the target set.

- 2.50 The virtual school continues to make significant progress in reducing the number of exclusions for care experienced young people, as evidenced in the table below. Work will continue this session, and they will continue to support schools to best meet the needs of care experienced children and young people.

Session	CE Exclusions	Days Lost	Young People
2019-20	158	339.5	92
2020-21	105	233	72
2021-22	82	138.5	56
2022-23	19	40	15
2023-24	11	22	11

Stretch Aims

- 2.51 When the Scottish Government moved to their new operating model in 2021-22 local authorities were asked to use local intelligence and data to identify stretch aims (targets) for various measures and to submit these to the Scottish Government. These measures are categorised as 'core' and 'core plus'. The core elements are part of a requisite package of measures identified by Scottish Government. Initially, in 2022-23 these stretch aims were set over a 1-year period however, from session 2023-24 local authorities were asked to set stretch aims over a three-year period.
- 2.52 At a minimum, **core** stretch aims had to include targets for both overall progress and for progress in reducing the poverty-related gaps (Q1 – most deprived vs Q5 – least deprived) in:
- achievement of Curriculum for Excellence Levels; % of pupils (P1, P4 and P7 combined) achieving expected levels or better in literacy and % of pupils (P1, P4 and P7 combined) achieving expected levels or better in numeracy;
 - % of leavers achieving 1 or more awards at SCQF level 5 or better (all SCQF) based on the "Summary Statistics for Attainment and Initial Leaver Destinations" publication;
 - % of leavers achieving 1 or more awards at SCQF level 6 or better based on the "Summary Statistics for Attainment and Initial Leaver Destinations" publication;
 - the percentage of young adults (16–19-year-olds) participating in education, training or employment in the LA in the year to 31st March based on the Annual Participation Measure produced by Skills Development Scotland; and
 - a locally identified aim for health and wellbeing, to be measured using local datasets.
- 2.53 The "core plus" element enabled local authorities to identify further aims, measurable by either local or national data.
- 2.54 The service identified the 4 'core plus' stretch aims outlined below. These areas were selected to reflect trends in data and ongoing service improvement work around the curriculum rationale and development of pathways for learners:
- % of P4 learners achieving expected levels for writing (CfE first level)
 - % of S3 pupils achieving third level or better in combined literacy (based on reading, writing and talking and listening)

- % of S3 pupils achieving third level or better in numeracy
 - % of leavers achieving S5 1+ Highers (A-C passes based on all candidates) (Excludes ASN schools) (based on S4 roll figures from Insight)
- 2.55 Appendix 1 shows progress towards our ambitious stretch aims. It is worth noting that when setting NL's core and core plus aims, evaluative evidence gathered through the first year of the target setting process was used, alongside guidance presented by the Scottish Government. The Service reflected on the potential tension between setting more cautious targets that are easier to achieve or setting more aspirational and challenging targets. Based on our high aspirations, and research evidencing that setting more challenging targets leads to better outcomes, NL set ambitious targets, accepting the risk that these may be difficult to achieve.
- 2.56 National ACEL attainment data, published in December 2024, and comparison results, indicate that NL is performing well nationally, in Curriculum for Excellence Levels (literacy: reading, writing, talking and listening and numeracy) across most stages and organisers, at the primary stages. However, for the purposes of this SAC report, we will focus on P,1,4,7 combined literacy and numeracy data as this is the main pre-requisite for the core stretch aim measures, as defined by Scottish Government.
- 2.57 Last session's P1, P4 and P7 combined data shows that the percentage of Quintile 1 (most deprived) pupils achieving expected levels or better in literacy (based on reading, writing and talking and listening) increased from 67.52% to 68.21%. This is in no small part due to the relentless focus on improving universal, additional and intensive support offers around these indicators.
- 2.58 Analysis of our P1,4,7 combined data for literacy and numeracy also indicates that last session we closed the attainment gap between our most (Q1) and least deprived (Q5) learners in both areas. For literacy, the gap reduced from 18.54pp to 15.07pp and for numeracy, the gap reduced from 16.1pp to 13.4pp.
- 2.59 In session 2023-24, the percentage of S3 learners achieving third level or better in literacy (based on reading, writing and talking and listening) dipped slightly in Q1 but improved in Q5. Q5 improved from 88.50% in session 2022-23 to 94.15% in session 2023-24. While we strive to close the attainment gap, we also want to improve outcomes for all learners including those within Q5.
- 2.60 Similarly, the percentage of S3 learners achieving third level or better in numeracy improved in both Q1 (78.13% in 2023 to 80.56% in 2024) and Q5 (93.87% in 2023 to 97.19% in 2024), in session 2023-24. Notably, the rate of improvement of learners in Q5 exceeded the rate of improvement of the learners in Q1, therefore this has impacted on our ability to close the gap. It is also worth noting that within NL we have significantly more learners within Q1 than within Q5.
- 2.61 The number of Q1 learners achieving at least 1 award at SCQF 5 and 6 (All SCQF Insight data) decreased last session and therefore, improving attainment in these areas will remain a key focus for improvement next session.
- 2.62 The Annual Participation Measure (APM) refers to the percentage of young adults (16–19-year-olds) participating in education, training or employment. Last session, our overall APM increased from 91.0% to 91.9%. However, notably, our APM for learners in Q1 rose from 85.7% to 87.2%.

- 2.63 One of NL's core plus stretch aims was to increase the percentage of leavers achieving 1+ Higher (A-C passes based on all candidates) in S5. Notably, the percentage of Q1 leavers achieving S5 1+ Higher last session increased from 36.84% to 37.7%.
- 2.64 We noted marginal gains in overall attendance figures at the primary stage with data increasing from 91.16% in 2023 to 91.61% in session 2024. Attendance rates for Q1 learners at the primary stages increased from 88.52% in 2023 to 89.15% in 2024. Overall attendance at the secondary stage increased from 85.54% in 2023 to 85.72% in 2024.
- 2.65 As previously reported, in setting NL's core and core plus stretch aims, evaluative evidence gathered through the first year of the target setting process (check year) was used and analysis of local and national attainment trends over a 5-year period to identify future targets. In line with Scottish Government guidance, the 2022-23 data was key to the target setting process. However, within NL, for some indicators, the 2022-23 data was above the normal trajectory, thus impacting on the baseline and subsequent aspirational stretch aims set. In summary, for some measures, that means that NL's baseline started at the highest baseline figure from within the 5-year trend data.
- 2.66 Based on NL's current improvement trajectory, incremental progress is being made towards the ambitious stretch aims set. Work will continue towards these targets, deploying resources to support increased attainment and improved outcomes. Although, based on current trajectories all aspirational stretch aims may not be reached, progress is evident in some key measures. Further information about our progress towards our stretch aims is available in Appendix 1.

Proposed SEF Plan for session 2025-26

- 2.67 As mentioned above, the service is planning that this is the final year of SAC funding (including SEF, PEF and CECYP). Therefore, the core plan is built on the premise that no further funding will be allocated for session 2026-2027.
- 2.68 To allow us to protect as much support as possible for establishments, the service has made difficult decisions and some of the original core model has been removed or significantly reduced to allow us to remain within our allocated budget. Notably, some of these core aspects can be directly funded by individual establishments using PEF funding.
- 2.69 Therefore, to allow us to continue to implement our strategic model, and maximise use of funding available for session 2025-26, we propose to make further amendments to the core model to maximise impact and increase the team's contribution to the wider central team.
- 2.70 Notably, we propose to reduce the funding for Future Fridays by a further £150,000 to £200,000. The allocated £200,000 will only partially cover costs associated with Principal Teacher of Future Friday posts. Schools will be required to use their own PEF allocations to deliver their individual Future Fridays offer and any associated costs. Simultaneously, the service is exploring possible options to create a new iteration of the Future Friday programme. Further information will be presented to committee in due course.
- 2.71 The total expenditure for the core model for session 2025-26 is outlined in the table below. Please note, the proposed spend is higher than the SEF allocation, and we are

reliant on the carry forward of circa **£900,000** from session 2024-25 to cover the planned spend, with remaining funds reserved for potential future pay awards etc. Importantly, the carry forward figure may vary slightly based on discrepancies between predicted expenditure and actual expenditure. Any additional funding at year end, will be used to further support the model.

Scottish Government SEF Allocation 2025-26	£3,383,214
2024-25 Carry Forward	£900,000
Total available for 2025-26	£4,283,214
Workstream 1: Leadership for Improvement	£502,302
Workstream 2: Health and Wellbeing	£1,722,776
Workstream 3: Leadership for Learning	£771,592
Non-Core Costs	£722,824
5% Admin Charge	£169,161
Total planned spend for session 2025-26	£3,888,655
Remaining funds available from SG Funding for April 2026 – August 2026	£394,559

Staffing Impact/Operating Model

- 2.72 As stated previously, due to reducing funding and the potential end of the SAC model in session 2025-26, the service has conducted a thorough review of all aspects of the model and made difficult decisions about whether to retain or end supports, in line with budget constraints. The diagram below illustrates the proposed core model for academic session 2025-2026.
- 2.73 As noted in the diagram below, from 1st April 2025 onwards, the five CIIL posts, previously funded through the SAC core model, will now be funded through a central budget line, out with SAC. This allows SAC funding to be used to extend the following posts into session 2025-26:
- 6 x Pedagogy PTs
 - 15 x FESAs

April 2025-March 2026

WORKSTREAM: Leadership for Improvement	Cost session 25/26	WORKSTREAM: Health and Wellbeing	Cost session 25/26	WORKSTREAM: Leadership for Learning	Cost session 25/26
Improvement & Resources Lead	£113,774	HWB Lead - NL15	£77,960	SAC Lead	£113,774
Future Friday costs	£200,000	Cluster Family Engagement Workers NL7 - 15 FTE	£567,165	ESO x 3 (Lit, Numeracy & LTA)	£258,954
Leaderships Resources	£2,000	Deletion - Cluster model 5 FTE from. (costed at DHT 3) 5 FTE	£0	ESO x 1 (STEM, Curriculum Dev/ LTA)	£86,318
Admin support: NLC5	£32,421	Police partners: Total of 8 shared funding:	£188,444	6 x PT1 Posts (August 25 to March 26)	£287,546
Business Apprentice NLC2	£28,485	3 Pathways Support Workers (NLC7)	£113,433	Literacy & Numeracy: Training Resources	£25,000
2x RDOs	£75,622	HWB ESO	£86,318	Total	£771,592
West Partnership	£50,000	CLD NLC 12 X3	£185,676		
Total	£502,302	Missing YP	£40,000		
		Total	£1,258,996		

2025/26 Allocation	£3,383,214
(plus) C/F 2024/25	£900,000
Total	£4,283,214
Core Model Total	£2,532,890
Non Core Spend	£722,824
5% Admin Charge	£169,161
Carry Forward Available	£858,339

April 2026-August 2026

2.74 Please note, the Future Friday allocation noted above is the allocation for April 2025 to August 2026. However, for budgeting purposes it is included in the April 2025 to March 2026 allocation.

WORKSTREAM: Leadership for Improvement	Cost session 25/26 (April - Aug 26)	WORKSTREAM: Health and Wellbeing	Cost session 25/26 (April - Aug 26)	WORKSTREAM: Leadership for Learning	Cost session 25/26 (April - Aug 26)
SAC Leadership and Equity	£37,915.00	HWB Lead - NL15	£25,987	SAC Curriculum and Pedagogy Lead	£37,915
1 x STEM ESO Curr Dev	£32,369.00	15 x NL7 FFESA posts	£189,055	6 x PT posts	£172,527
Admin support: NLC5	£10,807	HWB ESO	£32,369	ESO x 3 (Lit, Numeracy & LTA)	£97,108
Business Apprentice NLC2	£9,495	CLD NLC 12 X3	£61,892	Total	£307,550
West Partnership	£15,000	3 Pathways Support Workers (NLC7)	£37,811		
Total	£105,586.00	Total	£347,114		

CF 2025-26	£858,339
Total for model: April – August 2026 (minus oncosts etc)	£760,250

2.75 In addition to the changes outlined above, further posts funded as part of the session 2023-2024 SEF model will also come to an end in June 2024 and will not be replaced. It is worth noting that these were all temporary posts.

- **Curriculum Managers** – deletion of all 4 curriculum manager posts from 1 July 2025

- **Education Support Officers** – reducing from two temporary posts to one temporary post from 14 August 2025
- **Pedagogy Team** – 5.6 FTE PT posts and 11.4 FTE class teacher posts will reduce to 5.6 FTE PT posts only from 1 July 2025

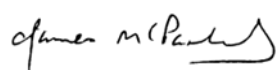
- 2.76 The reduction in the above posts will have significant workload implications on the remaining team, but all efforts will be made to continue with essential and impactful service provision.
- 2.77 To mitigate the impact of these reductions and in preparation for the end of the SAC model, the number of SAC Leads will be reduced from 2 FTE SAC Leads to 1.6 FTE from July 2025. The savings associated with this reduction, along with the carry forward noted above, will be used to potentially appoint one temporary Curriculum Manager (CM) and one Education Support Officer (ESO), subject to available funding. These posts will be for a period of one academic session, in the first instance.
- 2.78 The service recognises the challenges associated with managing the tapering funds and has sought to align and maximise the use of all available resources to continue to build staff capacity and ensure sustainable approaches to improvement, across the service. However, with the end of the Scottish Attainment Challenge Fund in session 2025-26, the service must maximise the use of all funds, using carry forwards strategically to ensure any SEF allocation is used to provide high quality support for the remainder of the funding programme, across the school academic year. Should updated information be provided by the Scottish Government about the future SAC funding, or equivalent additional funding, a further update will be brought to Committee for approval.

3. Measures of success

- 3.1 Reconfiguration of the SEF model will allow us to align and strengthen core functions of the team to raise attainment and close the poverty related attainment gap.
- 3.2 Reduced funding will be effectively managed to diminish risk and to maximise positive outcomes for children and families.
- 3.3 Clear outcomes and measures will be identified to support effective governance and reporting processes.
- 3.4 Priorities will be aligned to Stretch aims and service priorities to support transparency of reporting processes.

4. Supporting documentation

Appendix 1 – Core Model 2025-26



James McParland
Chief Officer (Education – South)

5. Impacts

5.1 Public Sector Equality Duty and Fairer Scotland Duty Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact? If Yes, has an assessment been carried out and published on the council's website? https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments Yes <input type="checkbox"/> No <input type="checkbox"/>
5.2 Financial impact Does the report contain any financial impacts? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, have all relevant financial impacts been discussed and agreed with Finance? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact? All aspects of finance within this report have been discussed with relevant finance officers and presented to E&F SMT.
5.3 HR policy impact Does the report contain any HR policy or procedure impacts? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, have all relevant HR impacts been discussed and agreed with People Resources? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact? All aspects of HR within this report have been discussed with relevant finance officers and presented to E&F SMT.
5.4 Legal impact Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.5 Data protection impact Does the report / project / practice contain or involve the processing of personal data? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, is the processing of this personal data likely to result in a high risk to the data subject? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk Yes <input type="checkbox"/> No <input type="checkbox"/>

5.6	Technology / Digital impact Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact? Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)? Yes <input type="checkbox"/> No <input type="checkbox"/>
5.7	Environmental / Carbon impact Does the report / project / practice contain information that has an impact on any environmental or carbon matters? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.8	Communications impact Does the report contain any information that has an impact on the council's communications activities? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact?
5.9	Risk impact Is there a risk impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed? SAC/SEF considered as part of risk register at service and CMT levels.
5.10	Armed Forces Covenant Duty Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.
5.11	Children's rights and wellbeing impact Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC). If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out? Yes <input type="checkbox"/> No <input type="checkbox"/>

Appendix 1: NL Key Performance Measures (Including core and core plus stretch aims and KMS identified in performance management framework)

Please note: 2023/24 attainment data has been updated following Scottish Government cleansing exercise and confirmation of latest SQA data. **Tolerance Level 0.5pp above or below.**

Key Performance Measure	June 2022 Attainment	June 2023 Attainment	June 2024 Attainment	June 2025 Attainment	Stretch aim Target (2026)
% of pupils (P1, P4 and P7 combined) achieving expected levels or better in literacy	72.23%	75.47%	75.05%		77.0%
% of Q1 pupils (P1, P4 and P7 combined) achieving expected levels or better in literacy	63.93%	67.52%	68.21%		69.40%
% of Q5 pupils (P1, P4 and P7 combined) achieving expected levels or better in literacy	82.94%	86.06%	83.28%		86.7%
Q1 – Q5 Gap (P1, P4 and P7 combined) achieving expected levels or better in literacy)	19.01pp	18.54pp	15.07pp		17.3pp
% of primary pupils (P1, P4 and P7 combined) achieving expected levels or better in numeracy	79.38%	81.31%	81.19%		90.46%
% of Q1 primary pupils (P1, P4 and P7 combined) achieving expected levels or better in numeracy	72.60%	74.80%	75.11%		82.48%
% of Q5 pupils (P1, P4 and P7 combined) achieving expected levels or better in numeracy	89.15%	90.90%	88.51%		97.35%
Q1 – Q5 Gap (P1, P4 and P7 combined) achieving expected levels or better in numeracy	16.55pp	16.10pp	13.4pp		14.87pp
% of S3 pupils achieving third level or better in literacy (based on reading, writing and talking and listening (Core Plus)	85.14%	84.35%	86.71%		87.0%
% of S3 Q1 pupils achieving third level or better in literacy (based on reading, writing and talking and listening (Core Plus)	79.21%	79.50%	79.30%		84.0%
% of S3 Q5 pupils achieving third level or better in literacy (based on reading, writing and talking and listening (Core Plus)	93.11%	88.50%	94.15%		92.20%
Q1 – Q5 Gap (S3 3 rd level or above literacy)	13.9pp	9.0pp	14.85pp		8.2pp
% of S3 pupils achieving third level or better in numeracy (Core Plus)	85.34%	85.11%	88.02%		89.10%
% of S3 Q1 pupils achieving third level or better in numeracy (Core Plus)	76.20%	78.13%	80.56%		81.50%
% of S3 Q5 pupils achieving third level or better in numeracy (Core Plus)	95.96%	93.87%	97.19%		95.5%
Q1 – Q5 Gap (S3 3 rd level or above numeracy)	19.76pp	15.74pp	16.63pp		14.0pp
Number and percentage of secondary school leavers by total qualifications attained under the All SCQF measure (S2.2a) (Based on leavers data therefore previous year's data.)	June 2022 (20/21 Insight)	June 2023 (21/22 Insight)	June 2024 (22/23 insight)		
% of leavers achieving 1 or more awards at SCQF Level 5 or better (All SCQF)	88.55%	87.46%	85.82		90.46%
% of Q1 leavers achieving 1 or more awards at SCQF Level 5 or better	81.73%	78.48%	77.09		82.48%
% of Q5 leavers achieving 1 or more awards at SCQF Level 5 or better	97.96%	96.60%	95.59%		97.35%
Q1 – Q5 gap SCQF 5	16.23pp	17.52pp	18.5pp		14.87%
% of leavers achieving 1 or more awards at SCQF Level 6 or better	67.49%	64.62%	61.89%		69.12%

Key Performance Measure	June 2022 Attainment	June 2023 Attainment	June 2024 Attainment	June 2025 Attainment	Stretch aim Target (2026)
% of Q1 leavers achieving 1 or more awards at SCQF Level 6 or better	54.82%	49.13%	48.93%		54.13%
% of Q5 leavers achieving 1 or more awards at SCQF Level 6 or better	83.67%	81.41%	82.89%		87.41%
Q1 – Q5 gap SCQF 6	28.85pp	32.28pp	33.96pp		33.28pp
Annual Participation Measure The percentage of young adults (16-19 year olds) participating in education, training or employment in the LA in the year to 31st March. (SDS data)	June 2022	June 2023	June 2024		
Overall	90.2%	91.0%	91.9%		94.6%
Quintile 1	85.1%	85.7%	87.2%		92.0%
Quintile 5	95.5%	96.0%	96.4%		98.0%
Q1 – Q5 gap (APM)	10.4pp	10.3pp	9.2pp		6.0pp
Core Plus Stretch aims		June 2023	June 2024		
% Attendance Primary		91.16%	91.61%		93.0%
% attendance Q1 Primary		88.52%	89.15%		89.8%
% attendance Q5 Primary		94.50%	94.69%		95.0%
Q1 – Q5 Gap Primary		5.98pp	5.54pp		5.2pp
% Attendance Secondary		85.54%	85.72%		88.4%
% Attendance Q1 Secondary		81.57%	81.21%		85.6%
% Attendance Q5 Secondary		90.41%	91.23%		91.7%
Q1- Q5 Gap Secondary		8.84pp	10.02pp		6.1pp
% of leavers achieving S5 1+ Higher (A-C passes based on all candidates) (Excludes ASN schools)	57.5%	53.36%	53.2%		57.41%
% of Q1 leavers achieving S5 1+ Higher (A-C passes based on all candidates)	40.6%	36.84%	37.7%		41.4%
% of Q5 leavers achieving S5 1+ Higher (A-C passes based on all candidates)	74.8%	77.58%	72.6%		78.82%
Q1 – Q5 gap leavers achieving S5 1+ Higher (A-C passes based on all candidates)	34.2pp	40.74pp	34.9pp		37.42pp
% of P4 learners achieving expected level for writing	70.90%	73.45%	73.89%		76.70%
% of Q1 P4 learners achieving expected level for writing	62.53%	66.35%	67.06%		70.4%
% of Q5 P4 learners achieving expected level for writing	81.21%	83.91%	84.40%		85.7%
Q1 – Q5 Gap for P4 learners achieving expected level for writing	18.68pp	17.56pp	17.34pp		15.3pp

*Final SCQF for 2024 leavers will be reported when the Summary Statistics for Attainment and Initial Leaver Destinations 2024 data is published in February 2025

*1 For reference, SEEMIS BI does not provide the S4 roll figure for Q1 or Q5 so this information has been taken from Insight (i.e. for 2024 – taken from 2023 S4 on Insight). The 2024 percentages are then a comparison of the number of pupils that got an A-C pass in the SEEMIS BI data with the S4

North Lanarkshire Council Report

Education, Children and Families Committee

Does this report require to be approved? ☒ Yes ☐ No

Ref AG/AGI

Date 20/05/25

Resilient People: Improving Health and Wellbeing, Family Support and School Attendance

From Alison Gordon, Chief Social Work Officer

E-mail GordonA@northlan.gov.uk

Telephone

Executive Summary

This report sets out for committee the continued progress in delivering whole family support locally, when families need it, in a way that addresses the impacts of poverty and reduces inequality – the core objective of the Resilient People Programme of Work.

In realising this ambition, the report illustrates how we are using additional funding through the Whole Family Being Fund (WFWBF), Scottish Equity Fund (SEF), the National Drug Mission Fund and the Community Mental Health and Wellbeing Support and Services Framework grant (CMHWBF) to support system change, in line with the council's new Operating Model, by resourcing preventative support at the earliest stage.

Members will also recall that we prioritise a family support approach to addressing school attendance issues. Often attendance is one of many issues affecting families. Throughout the report we highlight how tailored, trauma-informed and whole family support interventions support children, and their parents, attend school.

Recommendations

It is recommended that the Committee:

(1) Endorse the approach to supporting children and young people and families as outlined in the report.

The Plan for North Lanarkshire

Priority	Support all children and young people to realise their full potential
Ambition statement	(7) Enhance collaborative working to maximise support and ensure all our children and young people are included, supported, and safe
Programme of Work	Resilient People

1. Background

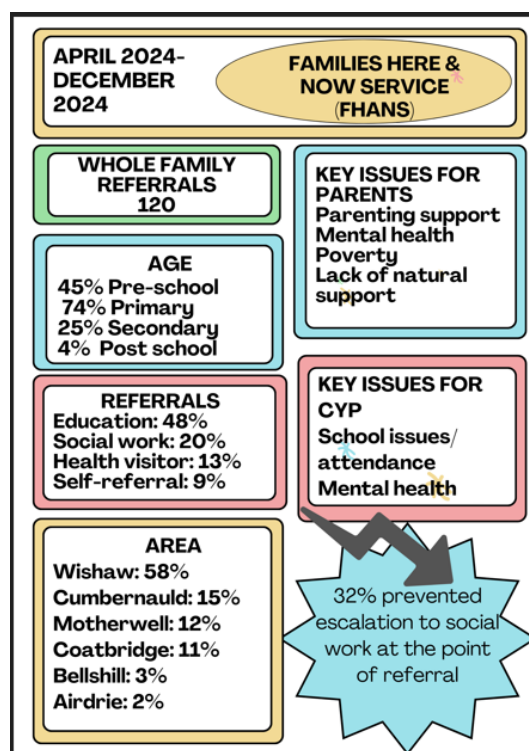
- 1.1 As reported to Committee in May and November 2024, the Resilient People Strategic Board is overseeing an ambitious programme of work to improve outcomes for children and their families through a long-term shift in resources to preventative support that gets the right support to families at the right time. The aim is to prevent need escalating and the consequent reliance on more costly and intensive services creating additional stress for children and their families. This is crucial in fulfilling the council's commitment to keep The Promise by upscaling family support that is flexible, accessible and relational. This programme of work also involves a shift in the way we work and is therefore linked with the council's new Operating Model programme to deliver more integrated and place-based support by the community, partners and the council. Some early achievements were presented to the Policy and Strategy Committee on 13 March 2025.
- 1.2 As part of their own commitment to keep The Promise, in 2022 the Scottish Government announced the Whole Family Wellbeing Fund to support local partnerships innovate around system change for families and reduce the need for crisis intervention. The Scottish Government has recently announced an extension to this fund as detailed in section 5.2 below. In North Lanarkshire, we have adopted a holistic approach in building the resilience of families which includes tackling poverty through direct financial assistance, a focus on skills and employability and whole family mental health and wellbeing. To this end, the Resilient People Programme Board has taken a strategic approach to the use of other temporary funding streams (for example, WFWBF, the CMHWBF and Fairer Futures funding), to ensure changes and innovations are aligned to maximise the impact for families. The Resilient People Programme Board also joins up developments to support adults through the Health and Social Care Partnership Strategic Commissioning Plan with work in children's services to achieve a whole family support approach.
- 1.3 While temporary monies have created some new capacity for change, these cannot be relied upon in the longer term. The Resilient People Board has therefore initiated a review of family support activity in North Lanarkshire as a basis for recommending a sustainable model of family support that fits with the new Operating Model by the end of this Programme of Work period. We have now created a baseline of family support activity across the council, including existing evaluation data, and the next step will be to cost and assess impact.
- 1.4 A significant part of the WFWBF has been invested in ensuring we have a universal offer of family support to prevent families reaching crisis point as far as possible, as required by the conditions of the grant. We have also taken a broad definition of family and, based on engagement with families, we have developed services at the additional and intensive levels and the focus of this report will be to provide committee with information about service provision and outcomes for children at each of these levels.
- 1.5 North Lanarkshire has had a continued focus on school attendance over the last two academic sessions. This is in response to both a local and national drop in attendance. In North Lanarkshire supporting families and meeting need has been at the centre of our approach to improving attendance alongside school-based initiatives. The coordinated and integrated approaches between schools, the community and voluntary sector and statutory services is key to improving attendance. The data show that we are continuing to improve attendance but that the strategic focus on this issue remains important to get back to pre-COVID levels, with a focus on those children and young people who have persistent absences patterns:

Attendance rate by sector - Session to end of March					
	2020	2021	2022	2023	2024
ASN	90.3%	84.9%	84.9%	86.5%	86.4%
Primary	94.3%	91.1%	91.3%	92.0%	92.7%
Secondary	92.2%	86.9%	85.9%	86.1%	87.4%
Grand Total	93.3%	89.2%	88.9%	89.4%	90.3%

2. Report

Whole Family Support – Universal Level

- 2.1 Members will recall the partnership of providers, led by Barnardos Scotland, who we have commissioned to deliver help to families at the earliest point of the GIRFEC staged intervention pathway. The Families Here and Now Service (FHANS) operate at universal level so is available to families to meet need at the earliest opportunity. Families can self-refer. The service also receives referrals from other agencies as part of wider planning for families where some intervention is required to prevent families reach crisis. The open access offers equity, making place-based family support available within each community in North Lanarkshire and removing barriers to access.
- 2.2 FHANS delivery started from April 2024 in the Newmains and St Brigid's community hub area using a test and learn approach as a blueprint for expansion. Use of the service tracks the pattern of service expansion across North Lanarkshire with most referrals coming from Wishaw area to date as illustrated in the infographic below. FHANS scaled up to cover Cumbernauld and Coatbridge in October and November 2024 and expanded to cover the whole of North Lanarkshire from December 2024.



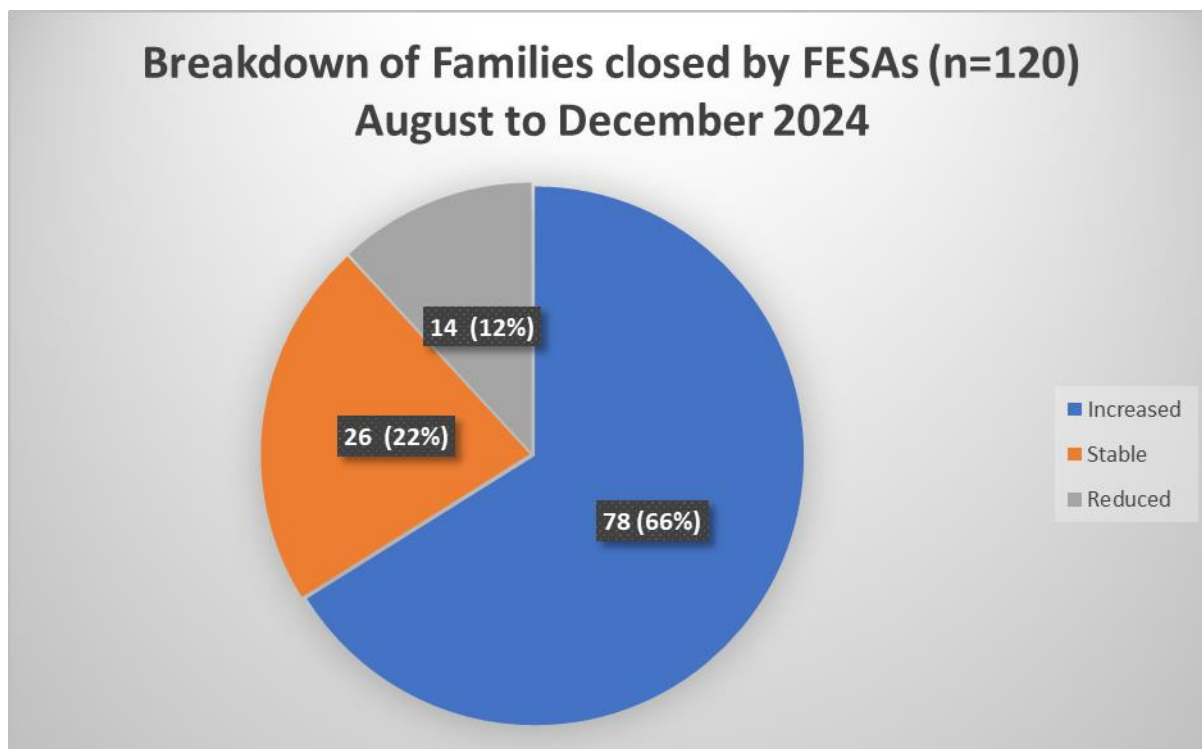
**** Note that age section does not calculate to 100% due to siblings in a family and children and parents attending group/ workshop/ drop-in sessions are not included as they are not formal referrals****

- 2.3 In the period April 2024 to December 2024 FHANS received 120 whole family referrals, 61% were received from the named person, evidencing alignment with the GIRFEC planning pathway. Referrers have indicated that in 32% of cases, referring to FHANS for intervention prevented a referral to social work as the need was met at an earlier stage. Self-referrals are increasing as the service becomes better known and trusted. As can be seen in the infographic above the most common areas of concern for families are:
- mental health
 - additional support needs,
 - school-based issues including attendance,
 - and poverty.
- 2.4 These issues are consistent with data from other family support services such as the Family Engagement Support Assistants. To address these areas, FHANS deliver a range of community-based support using interventions that extend to all life stages and address a broad range of needs, including:
- 1:1 direct support and intervention for children, young people, parents/carers and whole families.
 - Drop-in support on a Friday and group activity-based support at the weekends and in the evenings delivered from the community hubs.
 - A holiday activity programme for whole families and food vouchers, support to access material goods or activity vouchers.
 - Play and art therapy for groups and individuals.
 - A group has been established in two school areas for young people who are struggling with attendance
- 2.5 Delivery from community hubs has developed in line with the new Operating Model to ensure local support is available in communities. Education is the highest referrer evidencing how a joined-up approach between education and community support positively impacts on attendance and wellbeing. This is illustrated in the case study in Appendix 1.
- 2.6 The service measures impact using a tool called Outcome Star at three monthly intervals. 79% of the children, young people and families who have completed an Outcome Star to date have reported improved outcomes. To prevent families reaching crisis, and as a measure of effectiveness, FHANS check in with families at regular periods following the ending of their intervention for up to 1 year. To date, no families have been reopened for support, indicating that families have been supported to develop their resilience.
- 2.7 Next steps will include a focus on tackling poverty through a programme of recruitment of adult volunteers to support other families and working in a joined-up way with Routes to Work to ensure consistent pathways to employability for families. Planning is underway to provide an integrated offer of support from community hubs with employability, the tackling poverty team, community learning and development and other voluntary sector supports in line with the Operating Model and to enhance the 'no wrong door' ethos.

Family Support– Additional level support

Family Engagement Support Assistants

- 2.8 Family Engagements Support Assistants (FESAs) were established to respond to families where attendance issues had been identified, using a family support approach. FESAs are now operational across all clusters with an additional 1.5 FTE operating in the ASN sectors. Over the period of August to June 2024 FESAs worked with 547 children and completed work with 120 children. The outcomes for the 120 as regards attendance are set out in the chart below:



- 2.9 Members will recall data on the FESAs, reported to committee in November 2024 based on information taken in June 2024 covering school year 2023/24. The current chart shows an increased proportion of children having improved attendance when compared with data from the previous report. It shows a similar percentage showing stabilised attendance and a smaller proportion showing reduced attendance.
- 2.10 Contact with FESAs over the period and consideration of individual caseloads suggests that this may be related to a number of factors such as:
- FESAs reporting they had become more experienced in the role and therefore more effective. The most experienced FESAs completed work with more families and had greater levels of success than those who had been in the post a shorter time.
 - There is evidence of short pieces of work being carried out effectively with families to address issues more quickly.
 - Targeting has become better with many children being taken on with attendance in the 30-70% range which seems to show best results as an early intervention strategy.

- There are better examples of schools and FESAs working together to make sure that attendance measures are accurate, and good use is made of individualised provision.

2.11 In order to better understand the families where the work did not result in higher attendance, work has been carried out looking at the 14 families where the service was not successful. This showed the following:

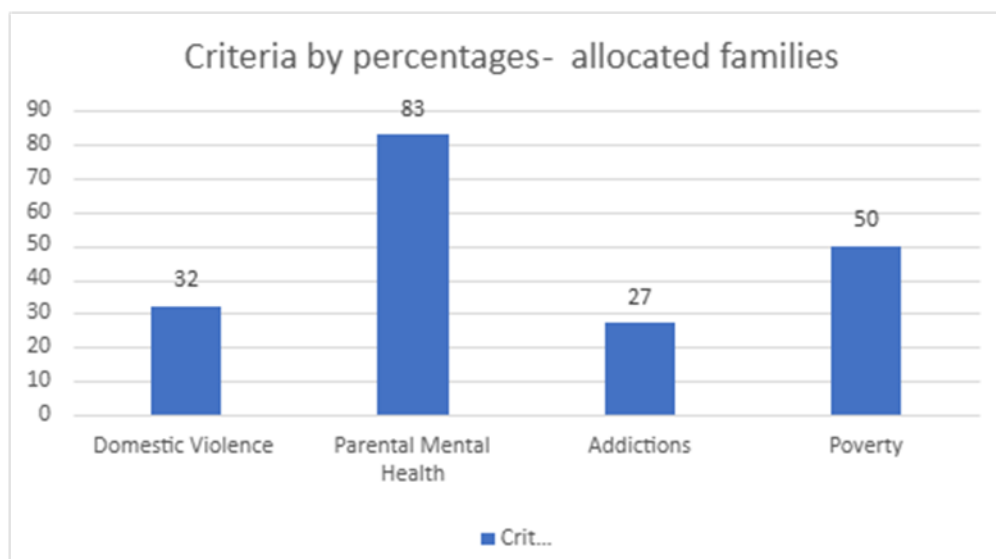
- 8 Families (the largest group) did not engage with support and more intensive supports are being considered through the Empowering Cluster.
- Families moved home and school. Those within North Lanarkshire are being monitored in their new school to see whether ongoing FESA contact is needed.
- children left school or moved to a focus on post school destination.
- 1 family decided to home educate

2.12 This data will help shape the training and approach of the FESAs going forward.

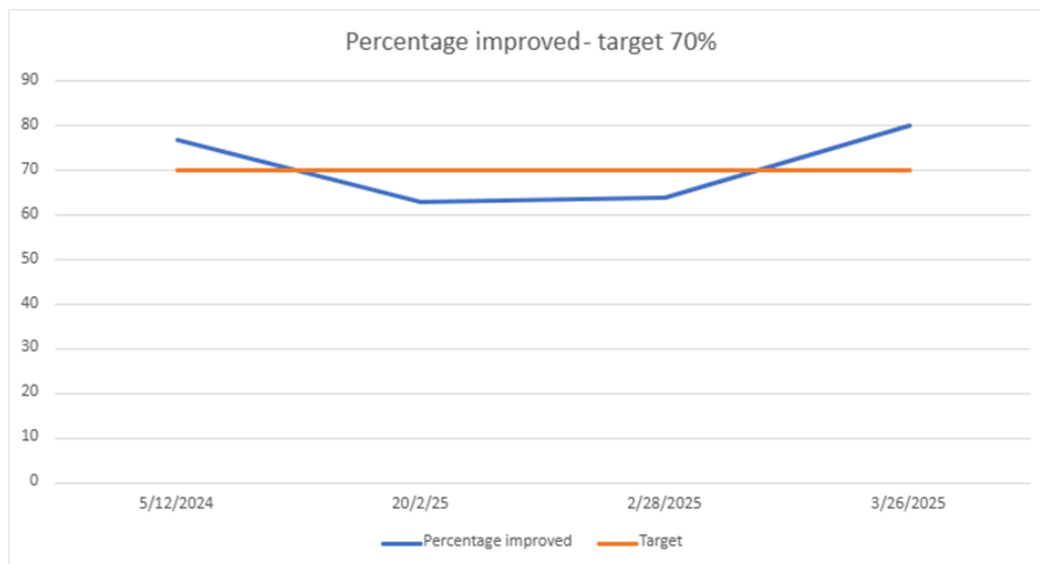
Early Years Family Engagement Service

2.13 The early years Family Engagement Service provides support to families with a child under 5 affected by substance use and other issues where more targeted support is required. The service is jointly funded by Scottish Government National Drug Mission Funding and the council. It has been fully operational for 18 months, and a total of 129 families have received support from the service across North Lanarkshire. Feedback from families can be seen in Appendix 2.

2.14 The graph below outlines the issues that the families are facing, with many families experiencing more than one adversity.



2.15 The service provides flexible whole family support to prevent difficulties escalating to the need for statutory involvement and has set an aspirational target to improve outcomes for 70% of the families engaging with the service (see graph below).



CLD based family support for children with additional support needs.

- 2.16 WFWBF has been used to provide a holistic one service approach across 7 days of the week, for families who have a child attending We Aspire or additional support needs schools through CLD family learning. The aim of the service is to complement the range of supports provided in schools to help families to better manage at home, improve mental health and prevent escalation of need.
- 2.17 Developing support has been focused on needs identified in each of the schools, and includes a range of individual, groupwork and community-based supports, for example:
- Transitional support from nursery to primary 1 in Firpark Primary
 - Transitional support between primary and secondary into S1 in recognition that this can be a challenging time when attendance can dip.
 - 1:1 supports
 - Yoga and relaxation
 - Weekend activities and groups
 - Family learning events
- 2.18 The service has worked with 143 individuals and impact is measured using the CLD family learning objectives. 132 people's wellbeing improved and 114 people experienced improved relationships, skills and confidence or accreditation or learning following intervention. An example is seen in the quote below, and further information can be found in Appendix 3.

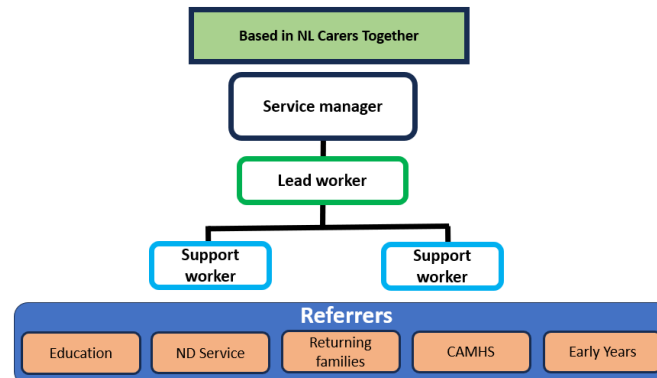
"The relaxation classes have helped me in a big way. I have suffered anxiety and Panic Attacks for years; this has been great for me the breathing techniques and all chill and help me function better at home with my son who has nonverbal autism"

Neurodevelopmental Family Support Workers

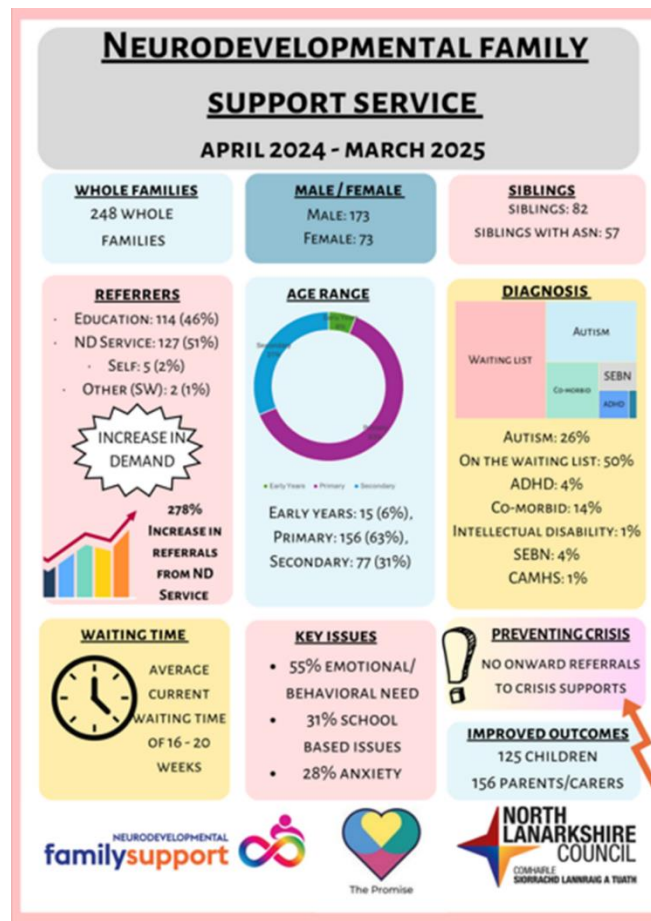
- 2.19 Members will be aware of the growing needs of families with children affected by neurodiversity. Our Neurodevelopmental family support service, provided by Carers Together, has seen a 278% increase in referrals from NHSL and a 40% increase in referrals from Education between April 2024 to March 2025.

- 2.20 In response to this increasing need, and in consultation with families, we have used WFWBF and CMHWP funding to enhance the service by extending the value of the contract and adding an additional two staff members as illustrated below.

ND FAMILY SUPPORT SERVICE STRUCTURE



- 2.21 The service provides a range of interventions including:
- 1:1 support for children, young people, siblings, parent carers and whole families.
 - Groupwork and peer support activities.
 - Advice and guidance about needs of a child or adapting an environment to meet need.
- 2.22 In the past year, no onward referrals have been made to intensive level supports and furthermore the team have received no requests for family support from anyone attending workshops. This is an indication that ND family support is effectively responding to need at the earliest time and building resilience that prevents escalation.
- 2.23 The council operating model has facilitated local delivery from Community Hubs and education cluster and wellbeing bases. The collaborative approach of the service has produced successful examples of joined working across, education, health and wider community partners. An example of this integrated working can be seen in Appendix 4.
- 2.24 An increasing number of support requests are for children who are pre-school age. A successful test of change was undertaken between ND Family Support and two early years family learning centres, and the initiative has been extended. Feedback is included in Appendix 4.



- 2.25 Members may recall that in the previous report we highlighted a test of change underway between the NHSL Neurodevelopmental Team, 2 school clusters, the ND Family Support Service and Hope for Autism, focused on promoting continued school attendance over the critical transition from primary to secondary school. The first year of this pilot has been completed successfully, with positive feedback from parents, and good school attendance for all those who transitioned to S1 as they now prepare to move to S2. The focus is now on continuing to support those children to maintain progress, while assessing the needs of the new P7 cohorts as they move to secondary school. The success of the joined approach to support has been captured in the quote below:

"Carers Together have been involved with a Neurodevelopmental Service Test of Change. Part of the test is about supporting the young people during transition. One girl in particular had challenges, but there was immediate action from Sarah to support the young person and her parent. This has resulted in the young person remaining at school, a really positive outcome. The team have a wealth of knowledge and experience that really support our families during all stages of their neurodevelopmental assessment. The service offers a great support to families."

Suzanne Shields, Clinical Manager,
Neurodevelopmental Service for Children
and Young People

Family Support – Intensive Level

Social Work Intensive Services

2.26 Social Work intensive services work alongside locality based social workers and support staff to provide additional support to children and young people and their families to prevent accommodation and support maintain family care. Intensive Services comprises Community Alternatives, working mainly with older children; Families First, working with younger children; Youth Bridges supporting young people in conflict with the law and with reintegration from prison/secure care to the community; the Aftercare Hub supporting care experienced young people and care leavers; and Family Group Decision Making / Lifelong Links supporting individuals and families to strengthen important relationships and the natural support network. The service operates seven days a week, providing intensive (sometimes daily) support on an individual, family and groupwork basis. The service is currently working with 463 individual children.

2.27 Between April 2024 and March 2025, the service concluded intervention with 360 children. The graph below highlights the underlying issues experienced for these children and their families at point of referral.



(Other – physical and emotional health, housing, lifestory work, relationships, aftercare)

2.28 When intervention concluded, the service is reported to have achieved the initial outcomes in full for 66% of children and their families and partially for 15%. In large part, this meant keeping children within the parents or extended family and avoiding the financial and human costs involved in this. 12% of the interventions with children and their families that concluded that the initial outcomes were not achieved. This is being reviewed by the team to understand what didn't work for those children and their families.

Family Group Decision Making

- 2.29 As previously reported, working from a strengths-based approach to support children remain in their family, our Family Group Decision Making (FGDM) service supports families build on family assets to sustain family care. The service has supported 107 families referred during April 2024 – March 25. The identified outcomes were to prevent accommodation, rehabilitation, maximise supports pre-birth, mediate and agree a family contact plan or to mobilise family support. 85 families have been supported to agree a plan, concluding with a Family Group Decision Making Meeting or this is being scheduled. 22 families have completed a significant piece of work, whereby a plan has been achieved without the requirement for a formal meeting. There were 30 families referred to the service where work did not progress due to a change in the child's plan or due to a withdrawal of consent or non-engagement.
- 2.30 A fuller report on the work of Family Group Decision Making will be brought to committee in November 2025.

Kinship Care and Virtual School

- 2.31 Within the Virtual School we have funded an additional worker to take a whole family support approach to improving outcomes for children in kinship care. The worker has contributed to stability at home and supported 29 young people to achieve National 3/4 qualifications, with over 70% of young people on track to achieve a minimum of five qualifications. The role has contributed to the **93%** reduction in exclusions for care experienced learners since 2019/20 with 8 exclusions session 24/25 in comparison to 11 the previous year.

3. Measures of success

- 3.1 Improved health and wellbeing of children and their families
- 3.2 Reduction in need for crisis services and requests of assistance to social work
- 3.3 Progress in improving attendance is maintained.
- 3.4 Outcomes for children, young people and their families are improved through positive relationships with staff and with trauma-informed approaches
- 3.5 Supports are easier to access and responsive to need – the 'no wrong door approach' – through integrated working within the new Operating Model, supported by the GIRFEC pathway
- 3.5 Reduction in number of children being cared for outside of their family

4. Supporting documentation

- 4.1 **Appendix 1:** Families Here and Now Service (FHANS) Case Study and feedback.
- 4.2 **Appendix 2:** Feedback from parents for Early years Family Engagement Service.
- 4.3 **Appendix 3:** Information from consultation and work undertaken by CLD ASN Family Support.
- 4.4 **Appendix 4:** Child case study on Neurodevelopmental Family Support Workers & Feedback from early years test of change.



Alison Gordon
Chief Social Work Officer

5. Impacts

5.1 Public Sector Equality Duty and Fairer Scotland Duty

Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty?

Yes ☐ No ☒

If Yes, please provide a brief summary of the impact?

If Yes, has an assessment been carried out and published on the council's website? <https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments>

Yes ☐ No ☐

5.2 Financial impact

Does the report contain any financial impacts?

Yes ☐ No ☒

If Yes, have all relevant financial impacts been discussed and agreed with Finance?

Yes ☐ No ☐

If Yes, please provide a brief summary of the impact?

North Lanarkshire received a grant of £2.351 million for 22/23 and 23/24 to be overseen through the governance of the Children's Services Partnership (CSP). A further £2.281 million was received for 24/25. The Scottish Government has now confirmed funding of £2.687 million for 25/26 and 26/27.

The Children's Services Partnership Board has responsibility for the governance of the fund and has the final decision about allocation.

In a letter dated 26 April 2023, Scottish Government confirmed that WFWF can be carried over to allow for planning. The current value held as an Ear marked reserve (EMR) is £5.313 million.

5.3 HR policy impact

Does the report contain any HR policy or procedure impacts?

Yes ☐ No ☒

If Yes, have all relevant HR impacts been discussed and agreed with People Resources?

Yes ☐ No ☐

If Yes, please provide a brief summary of the impact?

5.4 Legal impact

Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)?

Yes ☐ No ☒

If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic?

Yes ☐ No ☐

If Yes, please provide a brief summary of the impact?

5.5 Data protection impact

	<p>Does the report / project / practice contain or involve the processing of personal data?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, is the processing of this personal data likely to result in a high risk to the data subject?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>5.6</p>	<p>Technology / Digital impact</p> <p>Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>5.7</p>	<p>Environmental / Carbon impact</p> <p>Does the report / project / practice contain information that has an impact on any environmental or carbon matters?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
<p>5.8</p>	<p>Communications impact</p> <p>Does the report contain any information that has an impact on the council's communications activities?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
<p>5.9</p>	<p>Risk impact</p> <p>Is there a risk impact?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed?</p> <p>There is a risk in maintaining some of the services and approaches discussed in the report. Some of the work being carried out is funded through temporary funding which raises a risk about long term sustainability. As noted in the report, these risks are mitigated by a review of all our family support offers across the council, monitored by the Resilient People Strategic Programme Board.</p>
<p>5.10</p>	<p>Armed Forces Covenant Duty</p> <p>Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the</p>

<p>Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.</p>
<p>5.11 Children's rights and wellbeing impact</p> <p>Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?</p> <p>Yes <input checked="" type="checkbox"/> No</p> <p>If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC).</p> <p>A CRWIA has been undertaken in respect of Children's Services Planning Partnership and the focus on family support within the CSP upholds the interlinked rights of children</p> <p>If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?</p> <p>A CRWIA has been carried out for the commissioned family support service.</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>

IMPACT SO FAR



The Plan for North Larnagh
**PROGRAMME
OF WORK**

PREVENTING ESCALATION

"It feels like a big weight has been lifted"

THE RIGHT SUPPORT

"... Came into our lives just when we needed them"

NO WRONG DOOR APPROACH

"...Helped us to see what was out there for our family"

INCREASING ACCESS

"...I had nowhere to turn... things are so much better now"

FAMILIES HERE AND NOW SERVICE FAMILY SUPPORT CASE STUDY (March 2025)



Family context

Self referral made by mum to FHANS.

Mum reported child has genetic conditions, autism, learning difficulties and health problems. Child was extremely isolated, didn't attend school for 3 months, reporting being bullied and poor mental health. Rarely leaving the bedroom, poor hygiene and lack of socialisation.



Benefits of integrated support and responsive delivery in the local community.

Presenting issues

Child's mental health/ wellbeing.
School attendance.
Parental support.
Additional needs of child.
Mum made application for an ASN placement but had incorrectly filled form.

Support provided

Emotional & practical family support.
Communicated with school
Planning for child's wellbeing meeting.
Community FHANS group at Christmas
Community Hub Art group by FHANS
Plan for support at school 2 days weekly

Outcome

Child's wellbeing improved
Child is engaging with family life.
Following a plan for increased school attendance
Positive engagement with peers & active part of community groups.

SYSTEM BENEFITS

Earlier help saved the cost of intensive supports.

Sustainability/ future long-term

- Family resilience building.
- Reduced demand on intensive resources.
- Social integration.

Appendix 2: Early Years Family Engagement service feedback

Feedback from Families

"...it has shown me that we can have these positive experiences and I don't need to feel like I am a burden to anyone."

"She has listened, encouraged, motivated and supported me during each outing and has been so engaging and involved with the kids"



"I would love to continue working with them and keep working on building up my confidence and having their positive influence and support."

Feedback from Families

"...has been a big massive help and easing my anxiety around nursery and other aspects of our life"

"...I was at a stage I didn't know where to turn regarding my daughter and issues."
"...what a difference she has made to us"



"This service has been a great support to me and my family. I have a friendly non-judgmental worker, who will go out their way to help. This support is helping us with different areas of our family life."

Appendix 3 ASN family support (CLD)

WFWF Data return 1st June 24 – 1st April 25

Programmes and Interventions

Programmes/ interventions being delivered.	One to One Supports, Mini me Yoga, Family Learning events, Relaxation Techniques for parents, wire design project, Parent voice.
Venues used for delivery	We Aspire Skills Academy, Firpark Secondary, Bothwell Park High, Buchanan High, Mavisbank School, Devonview Nursery ASN room, Chapelside Community Centre, Summerlee Heritage Centre, Link Community Centre, Newmains Community Hub, Riverbank Community Hub.
No of individuals supported	143



Outcomes – As a result of attending CLD Interventions

132	Unique individuals have achieved a Health and Wellbeing Outcome.
114	Families have achieved a Family Learning outcome

Impacts Statements

Relaxation – Breathing technique workshop	The relaxation classes have helped me in a big way. I have suffered anxiety and Panic Attacks for years; this has been great for me the breathing techniques and all chill and help me function better at home with my son who has nonverbal autism
Relaxation – Chair Yoga classes	“Thank You” seems a poor repayment for all I have gained from the group. I write all this to highlight how important a group like this can be, the value of teaching people how to take a more healthy and positive approach to their mental health.
Mini Me Yoga	‘This group has really helped my family’

Parent Voice planning for Easter

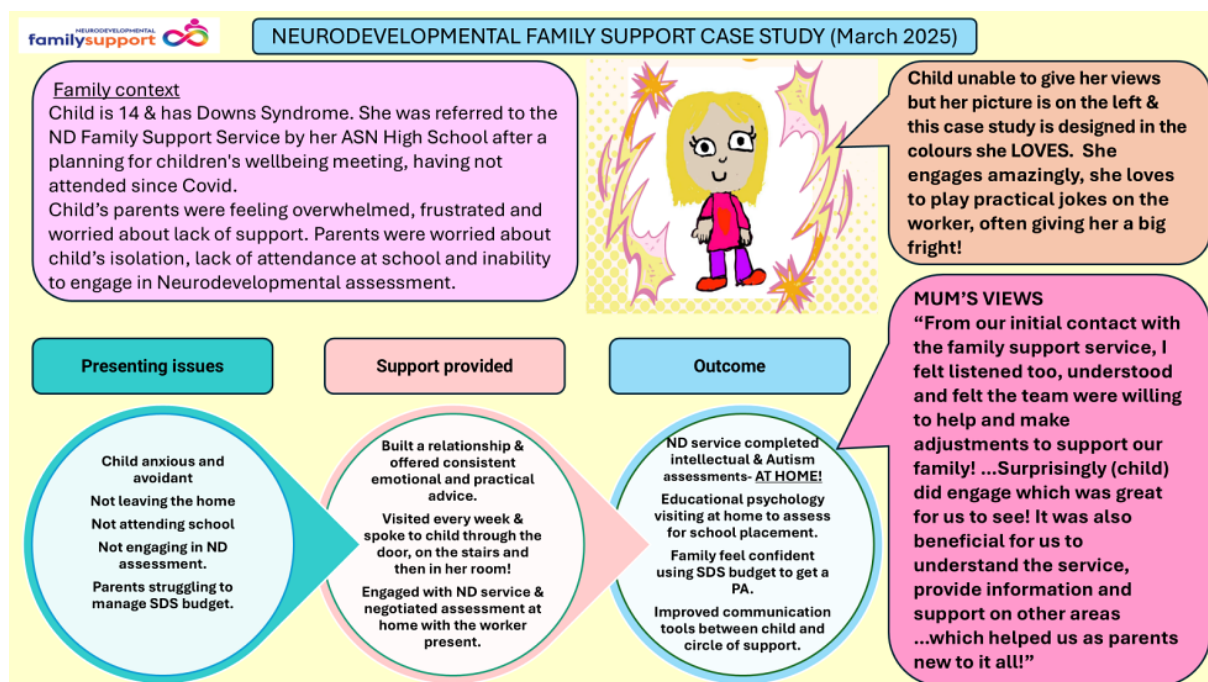
We have been liaising with Parents from Firpark and Clydeview Parent Council to co-produce a consultation that can help us to look at holiday provision for Families with Children/ Young People with additional support needs. We agreed to create a teams form and share this ahead of our Easter programme.

We received 129 responses from parents across all ASN establishments and the feedback was varied in terms of supports needed. The feedback received showed that 91% of Families would like to attend 'Meet ups' out with school time would be something they would attend and so during the Easter break, we intend to offer six opportunities for families to come together in their local community and enjoy activities that they have highlighted as appropriate. We hope to build on this engagement with parents as it has allowed us to respond to the needs identified by families.

Parent Feedback from Holiday Provision Consultation

- CLD are brilliant for everything they do to support ASN children. I really appreciate it as we can always feel a bit forgotten about.
- Anything for ASN during the holidays would be a blessing.
- Siblings able to attend for families with no other childcare.
- It feels great to know that my experience and opinions will help to shape services that improve experiences for young people in the future.


Appendix 4- Child case study on Neurodevelopmental Family Support Workers & feedback from early years pilot



An example of feedback from the early years test of change:

I really benefitted from speaking with the Carers Together team. I felt a bit lost before speaking to them with my child's struggles but after speaking to Karen I was given lots of helpful tip. I really feel more parents would benefit from speaking to Karen more regularly with hints/tips with our child's behaviours even just to talk and know you're not alone.

Parent involved in the Early Years pilot



"Having Karen in to support our parents has been beneficial to our children and staff. Having the opportunity to spend time talking to the parents and the change to listen uninterrupted was great. It was really relaxed, and I feel that the parents involved really opened and were happy to share. It was a slow build to get the parents involved but once they did everyone said it was invaluable knowledge and support. Parent are asking when Karen will be back.

Dunbeth Equity & Excellence Lead

Education, Children and Families Committee

Does this report require to be approved? ☐ Yes ☒ No

Ref: BS / SMcC

Date

20/05/25

Revenue Budget Monitoring Report

From: Barry Smedley (Chief Officer – Education North)

E-mail: SmedleyBar@northlan.gov.uk **Telephone:** 07919 245 004

Executive Summary

This report provides a summary of the financial performance of the Education and Families Service for the period 1 April 2024 to 28 February 2025 (Period 12). The report highlights the projected outturn position as at 31 March 2025, including explanations of major variances in accordance with North Lanarkshire Council's approved Financial Regulations.

The Education and Families Service has a net revenue budget of £535.999m for the 2024/25 financial year.

Incorporated within the revenue budget are approved savings totalling £9.595m. It is anticipated that £8.258m (86%) of these savings will be realised during the current financial year with Service management action addressing the in-year gap of £1.337m (14%).

The Service is currently forecasting a balanced budget position for the 2024/25 financial year.

Recommendations

It is recommended that the Education, Children and Families Committee:

- (1) Review the financial position of the Education and Families revenue budget.
- (2) Review the contents of the report.

The Plan for North Lanarkshire

Priority	All priorities
Ambition statement	(25) Ensure intelligent use of data and information to support fully evidence based decision making and future planning
Programme of Work	Statutory / corporate / service requirement

1. Background

- 1.1. North Lanarkshire Council's approved Financial Regulations require Deputy Chief Executives and Chief Officers to remain within their approved budgetary provision, and to report all significant deviations - defined as the higher of £100,000 or 5% - within their budget monitoring reports. Where significant deviations are identified, officers must provide explanatory commentary, outline the action required to rectify such deviations and where relevant, must also highlight the impact this has on other budget headings.
-

2. Report

Summary of Financial Position

- 2.1.1. At the meeting of Council on 15 February 2024, North Lanarkshire Council approved its General Fund Revenue Budget of £1,016.750m for the 2024/25 Financial Year, of which, £513.127m (50.5%) represented the approved net revenue budget for the Education, Children and Families Service. During 2024/25 there has been a net budget increase of £22.872m to £535.999m. These movements include the incorporation of the 2024/25 pay award for single status and teaching staffing cohorts (£11.978m); along with confirmed 2024/25 redeterminations which include additional funding for teacher's pension contributions (£6.128m) and teacher's induction scheme (£3.883m).
- 2.1.2. The Service is forecasting a balanced budget position the end of the financial year. Further analysis of major variances is provided within **Section 2.2** of this report.
- 2.1.3. The current 2024/25 budget incorporates £9.595m of savings previously approved by the Council. Further information regarding particularly challenging savings, along with associated management actions and replacement in-year savings, are included within this report at **Appendix 5**.

Analysis of Significant Variances

- 2.2.1 The Service has a total employee budget of £395.808m and currently anticipates a projected net underspend of £0.516m. The underspend reflects actual and projected vacancies, along with the roll-out of finalised HQ, cluster, and school staffing structures offset by other employee cost pressures within the Service.
- 2.2.2 Service employee budgets are partly devolved to establishments per the Devolved School Management (DSM) scheme, with the remaining budgets held at HQ level. Under the DSM scheme, devolved school / nursery staffing budgets for teaching and non-teaching posts are delegated to Head of Establishment management. Establishments receive budgetary allocations based on agreed formulas and distribution methods.
- 2.2.3 The Service is anticipating a net overspend of £0.233m within Property Costs primarily due to utility cost pressures within the education estate.
- 2.2.4 The Service is anticipating a net underspend of £0.822m within Supplies & Services which encompass various compensatory variances across the Service.

- 2.2.5 The Service is anticipating a net overspend of £2.192m within Transport & Plant which reflects cost pressures aligned to 'Home to School' contractual commitments within mainstream (£0.111m), ASN (£1.912m) and Gaelic provision (£0.237m) partially offset by cumulative minor underspends across the Service (£0.068m).
- 2.2.6 The Service is anticipating a net underspend of £0.223m within Administration Costs which encompass various compensatory variances across the Service.
- 2.2.7 The Service is anticipating an underspend of £0.693m within Payments to Other Bodies. This underspend is partly explained by the level of demand for Family Placements in comparison to overall resources currently available following the receipt of an additional £1.162m Scottish Government funding for the start of the 2024/25 financial year. There are offsetting financial pressures within ASN pupil placements (£0.200m), expenditure aligned to Gaelic provision (£0.203m) along with various compensatory variances across the Service.
- 2.2.8 The Service is anticipating an underspend of £0.080m which encompasses various compensatory variances across the service.
- 2.2.9 The Service is anticipating an underspend of £0.554m within Other Expenditure which is aggregated across several budget areas including the music programme (£0.100m) and various minor underspends within Children & Families (£0.116m).
- 2.2.10 The Service is anticipating an under-recovery of income of £0.463m which reflects the ongoing trend in reduced cross-boundary ASN placements within NLC educational settings (£0.516m) and minor over-recoveries across the Service.
- 2.2.11 At this stage of the financial year the Service is anticipating a balanced budget position across budgetary categories aligned to Capital & Revenue Financing Costs as outlined in **Appendix 2**.

Earmarked Reserves

- 2.3.1 In finalising North Lanarkshire Council's annual accounts to 31 March 2024, the Education and Families Service was given approval to earmark £95.265m of resources to fund key projects and initiatives. The largest reserve (£60.969m) is earmarked for future years commitments to school building / hub programmes. Other specific reserves include Pupil Equity Fund (PEF) carry forwards; Devolved School Management (DSM) carry forwards; resettlement initiatives, Whole Family Wellbeing Fund; and ELC / 1140 funding.
- 2.3.2 The Service anticipates utilising £17.531m of allocated earmarked reserves in the current financial year. This in-year projection reflects the planned phasing of resources (£16.765m) to future years following the completion of strategic reviews in relation to the operational requirements and financial planning assumptions aligned to individual programmes.
- 2.3.3 Future monitoring reports will continue to provide updates on the planned use of reserves during 2024/25, and in future financial years, as outlined in **Appendix 4**.

2024/25 Budget Savings

- 2.4.1 Incorporating base budget adjustments and specific proposals, the Council previously approved total Service savings of £9.595m to be achieved during financial year

2024/25. The Service assesses a variety of records and management information to monitor and review the achievement of its approved budget savings. As at Period 12, it is anticipated that £8.258m (86%) of the approved in-year savings target will be realised in the current financial year.

- 2.4.2 The majority of the unmet in-year saving has resulted from the formal introduction of the Early Years restructure occurring at a later date than was envisaged in the original programme timeline.
- 2.4.2 Through a combination of utilisation of aligned EMRs and other management actions, the Service has identified replacement funding streams to fully offset the in-year savings gap of £1.337m (14%). Future monitoring reports will continue to provide updates on the deliverability of approved savings during 2024/25, and future financial years if applicable, as outlined in **Appendix 5**.

Management Actions

- 2.5.1 Senior officers will review and implement actions through to financial year end with the aim of ensuring the Service continues to operate within its overall financial envelope. These actions will include:
- 1) Vacancy management
 - 2) Creating efficiencies through the use of grant / external funding
 - 3) Curtailment of non-essential expenditure
 - 4) Application and utilisation of earmarked reserves to offset in-year cost pressures

3. Measures of success

- 3.1. The service operates within approved budget resources and requirements of the Council's approved Financial Regulations.

4. Supporting documentation

Appendix 1: Objective Analysis
Appendix 2: Subjective Analysis
Appendix 3: Payments to Other Bodies
Appendix 4: Status of Earmarked Reserves
Appendix 5: Savings



Barry Smedley
Chief Officer (Education – North)

5. Impacts

5.1	<p>Public Sector Equality Duty and Fairer Scotland Duty</p> <p>Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>If Yes, has an assessment been carried out and published on the council's website? https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
5.2	<p>Financial impact</p> <p>Does the report contain any financial impacts?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, have all relevant financial impacts been discussed and agreed with Finance?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p> <p>As stated within the main body of the report.</p>
5.3	<p>HR policy impact</p> <p>Does the report contain any HR policy or procedure impacts?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, have all relevant HR impacts been discussed and agreed with People Resources?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
5.4	<p>Legal impact</p> <p>Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
5.5	<p>Data protection impact</p> <p>Does the report / project / practice contain or involve the processing of personal data?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, is the processing of this personal data likely to result in a high risk to the data subject?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
5.6	<p>Technology / Digital impact</p> <p>Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>

<p>Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>5.7 Environmental / Carbon impact</p> <p>Does the report / project / practice contain information that has an impact on any environmental or carbon matters?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
<p>5.8 Communications impact</p> <p>Does the report contain any information that has an impact on the council's communications activities?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact?</p>
<p>5.9 Risk impact</p> <p>Is there a risk impact?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed?</p> <p>The approach outlined in this report supports the Council's actions in managing financial sustainability and financial management risks. Financial pressures and risks are reviewed on a regular basis by the Service Management Team (SMT), Business Management Team (BMT), Corporate Management Team (CMT) and Committee.</p>
<p>5.10 Armed Forces Covenant Duty</p> <p>Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.</p>
<p>5.11 Children's rights and wellbeing impact</p> <p>Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC).</p> <p>If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>

NORTH LANARKSHIRE COUNCIL
Revenue Budget Monitoring Report - Objective Analysis
Period 12 (01 April 2024 - 28 February 2025)
Education, Children & Families

DIVISION OF SERVICE [1]	ANNUAL BUDGET [2]	PROJECTED OUT-TURN [3]	PROJECTED OUT-TURN VARIANCE [4]	% [5]	PERIOD MOVEMENT [6]	ANALYSIS [7]
Early Years	31,417,926	31,417,926	0	0.0%	0	Balanced Budget
Primary Schools	147,761,754	147,761,754	0	0.0%	0	Balanced Budget
Secondary Schools	133,474,732	133,474,732	0	0.0%	0	Balanced Budget
Special Schools	26,779,053	26,779,053	0	0.0%	0	Balanced Budget
Education Service Delivery	145,397,572	147,788,873	(2,391,301) ADV	(1.6%)	(1,250,042)	Overspend primarily in relation to external placements / income under-recovery within the ASN sector coupled with observed cost pressures within 'Home to School Transport' aligned to ASN and Gaelic provision offset by establishment vacancies curtailment of non-essential expenditure
Children & Families	40,648,864	38,818,993	1,829,871 FAV	4.5%	1,331,719	Underspend primarily due to grant synergies and utilisation of other funding streams; Family Placement Payments; curtailment of non-essential expenditure within various budget headings; offset by cost pressures observed within staffing structures
Justice Services	91,691	(414,847)	506,538 FAV	552.4%	481,243	Underspend primarily in relation to vacancies within employee costs
Employability	3,014,911	2,766,524	248,387 FAV	8.2%	(259,875)	Underspend primarily in relation to vacancies within employee costs and payments to external providers
Community Learning	5,393,020	5,518,798	(125,778) ADV	(2.3%)	(198,721)	Overspend primarily relating to employee costs and removal of union rep recharge income.
Tackling Poverty	2,001,954	2,069,671	(67,717) ADV	(3.4%)	(104,324)	Overspend primarily relating to employee costs
NET EXPENDITURE	535,981,477	535,981,477	0	0.0%	0	Balanced Budget

NORTH LANARKSHIRE COUNCIL
Revenue Budget Monitoring Report - Subjective Analysis
Period 12 (01 April 2024 - 28 February 2025)
Education, Children & Families

CATEGORY [1]	ANNUAL BUDGET [2]	PROJECTED OUT-TURN [3]	PROJECTED OUT-TURN VARIANCE [4]	% [5]	PERIOD MOVEMENT [6]	ANALYSIS [7]
EMPLOYEE COSTS	395,788,930	395,272,646	516,284 FAV	0.1%	15,129	Underspend primarily due to phasing of external funding; timing of recruitment to reflect operational requirements; Service vacancy management; offset by other employee cost pressures
PROPERTY COSTS	53,958,199	54,191,418	(233,219) ADV	(0.4%)	42,339	Overspend primarily due to utility costs within the education estate
SUPPLIES & SERVICES	16,980,941	16,159,309	821,632 FAV	4.8%	720,374	Net underspend due to various compensatory variances across the Service
TRANSPORT & PLANT	23,497,650	25,689,284	(2,191,634) ADV	(9.3%)	(1,341,883)	Overspend primarily due to observed cost pressures within 'Home to School Transport' aligned to ASN and Gaelic provision
ADMINISTRATION COSTS	4,144,065	3,921,006	223,059 FAV	5.4%	185,489	Minor underspend
PAYMENTS TO OTHER BODIES	50,079,519	49,386,731	692,788 FAV	1.4%	329,615	Underspends within Family Placement Payments and various other Service areas offset by overspends in relation to external ASN placements and Gaelic Education provision
TRANSFER PAYMENTS	4,072,963	3,993,035	79,928 FAV	2.0%	(204,483)	Underspend primarily in relation to education provisions aligned to the Early Years sector and care plan payments within Children & Families
CAPITAL FINANCING COSTS	41,246,297	41,246,297	0	0.0%	0	Balanced Budget
REVENUE FINANCING COSTS	0	0	0	0.0%	0	Balanced Budget
OTHER EXPENDITURE	19,103,525	18,549,100	554,425 FAV	2.9%	183,828	Underspend primarily in relation to external grant synergies aligned to Music provision; various minor underspends within Children & Families; and external company payments within Employability
TOTAL EXPENDITURE	608,872,089	608,408,826	463,263 FAV	0.1%	(69,592)	As stated above
INCOME	(72,890,612)	(72,427,349)	(463,263) ADV	0.6%	69,592	Under-recovery of income primarily in relation to ASN placements and service provision within NLC settings offset by some small over recovies in HQ
NET EXPENDITURE	535,981,477	535,981,477	0	0.0%	0	Balanced Budget

NORTH LANARKSHIRE COUNCIL
Revenue Budget Monitoring Report - Payments to Other Bodies
Period 12 (01 April 2024 - 28 February 2025)
Education, Children & Families

CATEGORY [1]	ANNUAL BUDGET [2]	PROJECTED OUT-TURN [3]	PROJECTED OUT-TURN VARIANCE [4]	% [5]	PERIOD MOVEMENT [6]	ANALYSIS [7]
General PTOBs	10,071,801	10,191,504	(119,703) ADV	(1.2%)	55,120	Overspend in relation to payments aligned to Gaelic Education offset by various minor underspends within the Service
Additional Support Needs	8,831,422	9,031,422	(200,000) ADV	(2.3%)	200,000	Net overspend in relation to external ASN placements
Early Years	17,018,049	17,018,049	0	0.0%	0	Balanced Budget
Voluntary Organisations	1,184,413	1,176,163	8,250 FAV	0.7%	(2,750)	Minor underspend
Family Placements	12,791,100	11,856,414	934,686 FAV	7.3%	95,743	Net underspend within Family Placement Payments aligned to fostering, kinship, and adoption fees and allowances
Children's Services - General	182,734	113,179	69,555 FAV	38.1%	(18,498)	Underspend in relation to various non-family placement allowances and payments
TOTAL EXPENDITURE	50,079,519	49,386,731	692,788 FAV	1.4%	329,615	As stated above

NORTH LANARKSHIRE COUNCIL
Revenue Budget Monitoring Report - Status of Earmarked Reserves
Period 12 (01 April 2024 - 28 February 2025)
Education, Children & Families

	FINANCIAL YEAR - 2024/25								
DESCRIPTION OF EARMARKED RESOURCE	Approved Reserve	Profiled in Future Years	In-Year Reserve Total	Spend to Date	Projected Spend		No Longer Required	Reserves Required In Year	Commentary Regards Usage
					Value	%			
Service Specific Earmarked Reserves:									
School Carry Forward (DSM)	2,655,000	0	2,655,000	2,655,000	2,655,000	100.0%	0	2,655,000	In-Year Reserve fully utilised
Pupil Equity Fund (PEF) Carry Forward	2,153,000	0	2,153,000	2,153,000	2,153,000	100.0%	0	2,153,000	In-Year Reserve fully utilised
Supporting Education Service Delivery	6,496,920	(3,963,409)	2,533,511	2,435,734	2,533,511	100.0%	0	2,533,511	Projecting full utilisation of In-Year Reserve
Early Learning & Childcare	5,213,000	(1,880,851)	3,332,149	3,045,249	3,332,149	100.0%	0	3,332,149	Projecting full utilisation of In-Year Reserve
Developing the Young Workforce Initiatives	680,000	(266,892)	413,108	413,108	413,108	100.0%	0	413,108	In-Year Reserve fully utilised
Supporting Children & Families Service Delivery	40,000	0	40,000	40,000	40,000	100.0%	0	40,000	In-Year Reserve fully utilised
Children & Families - Whole Family Wellbeing Fund	4,417,000	(2,946,000)	1,471,000	806,230	1,471,000	100.0%	0	1,471,000	Projecting full utilisation of In-Year Reserve
SEF / SAC Carry Forward	943,000	0	943,000	943,000	943,000	100.0%	0	943,000	In-Year Reserve fully utilised
Shotts Prison SLA	116,000	(106,000)	10,000	9,352	10,000	100.0%	0	10,000	Projecting full utilisation of In-Year Reserve
Employability Initiatives (incl. 'NOLB')	2,784,000	(2,135,867)	648,133	584,856	648,133	100.0%	0	648,133	Projecting full utilisation of In-Year Reserve
CLD & Voluntary Organisations Youth Work Initiatives	248,000	(29,492)	218,508	205,857	218,508	100.0%	0	218,508	Projecting full utilisation of In-Year Reserve
Resettlement & Unaccompanied Minors	8,323,000	(5,236,584)	3,086,416	2,929,944	3,086,416	100.0%	0	3,086,416	Projecting full utilisation of In-Year Reserve
Tackling Poverty Initiatives	227,000	(200,000)	27,000	19,626	27,000	100.0%	0	27,000	Projecting full utilisation of In-Year Reserve
PPP/DBFM Contractual Commitments	60,969,075	(60,969,075)	0	0	0	0.0%	0	0	
TOTAL	95,264,995	(77,734,170)	17,530,825	16,240,956	17,530,825	100.0%	0	17,530,825	

NORTH LANARKSHIRE COUNCIL
Revenue Budget Monitoring Report - Savings
Period 12 (01 April 2024 - 28 February 2025)
Education, Children & Families

DESCRIPTION OF APPROVED SAVING	APPROVED SAVINGS				REPLACEMENT SAVING / FUNDING			Commentary
	Target Value £000	Value Deliverable £000	Savings Gap £000	Reasons for Savings Gap	DESCRIPTION	Value £000	Revised Savings Gap £000	
Base Budget Adjustments:								
Reduction in Children's Services HQ Employee Costs	117	117	0				0	
Sub-Total Base Budget Adjustments	117	117	0			0	0	
Approved Savings								
Review of ELC: Single Status Employee Resources	2,000	750	1,250	Gap primarily due to saving phasing asymmetry with majority of ELC staffing cohort ceasing employment with the Council at the end of June 2024.	Phasing delay included within the financial modelling assumptions of the ELC EMR.	1,250	0	
Review of Staffing Turnover Within Schools	375	375	0				0	
School Transport (Move distance threshold to statutory limit)	1,200	1,200	0				0	
Sub-Total 2023/24 impact of previously approved savings	3,575	2,325	1,250			1,250	0	
Approved Savings (Operational Decisions)								
Removal of Early Years Absence Funding	294	294	0	Awaiting confirmation of discrete allocation within in-scope budgets.	Management action regarding curtailment of non-essential expenditure	45	0	
Contracts and Provisions (Under-utilised budgets)	45	0	45				0	
Under-utilised corporate parenting discretionary budget	21	21	0				0	
Service redesign and efficiencies through transition to SDS	24	24	0				0	
Reduce discretionary spend in training	54	54	0				0	
Under-utilised budgets	125	125	0				0	
Sub-Total 'Operational Decisions'	563	518	45			45	0	
Approved Savings (Budget Decisions)								
Network Support - Removal of unutilised budget	213	213	0	Awaiting confirmation of discrete allocation within in-scope budgets.	Management action regarding curtailment of non-essential expenditure	42	0	
Service redesign and efficiencies through transition to SDS	42	42	0				0	
Review if service delivery across Youth Employability Hubs	670	670	0				0	
Review of CLD service delivery, including the provision of youth diversionary activities	163	121	42				0	
Music Service - Reduction in staffing	140	140	0				0	
Removal of extra curricular activity delivered by existing staff	1,090	1,090	0				0	
Historic Recurring Underspends	3,022	3,022	0				0	Current financial modelling assumptions indicate that this saving will be achieved. This will be kept under review during the course of the financial year.
Sub-Total 'Budget Decisions'	5,340	5,298	42			42	0	
TOTAL	9,595	8,258	1,337			1,337	0	

