



House of Commons
Education Committee

A ten-year plan for school and college funding

Tenth Report of Session 2017–19

*Report, together with formal minutes relating
to the report*

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The Education Committee

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Contents

Summary	3
1 Introduction	6
2 Funding pressures	7
Overview	7
Achieving education spending efficiencies and the use of consultants	9
Government position on school and college funding levels	10
The Department's use of data	12
3 Core school funding	14
Background	14
Practical implementation	16
National Funding Formula and multi-academy trusts	18
4 Post-16 education funding	21
Overview	21
Impacts and implications	21
Government position	23
5 Social justice and tackling disadvantage	25
Overview	25
Improving Pupil Premium	25
Post-16 disadvantage funding	29
6 Special educational needs and disabilities	33
Background to SEND funding	33
Impacts	37
Tackling the problem	38
7 Towards a solution - a ten year plan	41
Long-term strategy	41
Costs	42
Funding model	43
Government position	46

Conclusions and recommendations	48
Formal minutes	53
Witnesses	54
Published written evidence	55
List of Reports from the Committee during the current Parliament	58

Summary

School and college funding is under growing pressure. More pupils, the cumulative effect of education reforms, and increasingly complex special needs requirements have put significant strain on the education sector over the past decade, whilst pressures on social services have led schools and colleges to provide support across a growing variety of areas. Funding has not increased in line with these rising demands, as data from the Institute for Fiscal Studies and the Education Policy Institute clearly show. Indeed, total school spending per pupil fell by 8% in real terms between 2009–10 and 2017–18. Per pupil funding for 2019–20 is expected to be similar to 2011–12 levels. Teachers, unions and parents have described to us in detail the scale of the impact this has had on children and young people, and on those working in the education sector.

Further education has been hit the hardest. Participation in full time further education has more than doubled since the 1980s, yet post-16 budgets have seen the most significant pressures of all education stages. Per student funding fell by 16% in real terms between 2010–11 and 2018–19 – twice as much as the 8% school funding fall over a similar period. This funding gap is the result of policy choices that now need to be addressed urgently. The social justice implications of the squeeze on further education colleges are particularly troubling, given the high proportion of disadvantaged students in these institutions.

The underlying reasons for this bleak funding picture are varied, ranging from the lingering consequences of the financial crisis through to systemic failures in forward planning and operational delivery, and significant discrepancies between funding requirements and budget availability that have driven a vicious cycle of spiralling costs. We noted that substantial amounts of money have been allocated to the education system—for example the additional £1.3 billion for schools and high needs, and the multi-million pound T level commitments—even within constrained fiscal circumstances. As the Institute for Fiscal Studies highlighted in its report on long-run trends in school spending, the Government took action to protect school funding between 2015–16 and 2019–20 as compared to other unprotected departments. We were pleased to see that education funding is rising up the political agenda, and that there is growing recognition of the need for a long-term plan to address the numerous ongoing challenges across the school and college funding system.

The Government's mantra that 'more money than ever is going into education' has been counter-productive. Not only has it fuelled an unnecessarily adversarial relationship with parents and teachers across the country, but it has also given the impression of a Department unwilling to engage with the realities of funding pressures whilst signalling the Government was wrongly focusing on absolute funding levels rather than the more important question of actual sufficiency. We were pleased to see a recent change in the Department's rhetoric on this front, and hope this indicates a long-overdue attempt to move beyond the deeply polarised stances that have characterised the debate in recent years.

Within the context of the upcoming spending review, the Department must make the strongest possible case to the Treasury for multi-billion pound funding increases, and take a much more strategic long-term approach to spending, or else risk stretching the school and college education system beyond breaking point.

Looking to the future, the Department must be clear that securing additional funding in the now overdue spending review will not fix deeper problems with the overall funding system. Throughout our inquiry we encountered a troubling lack of long-term vision – an issue compounded by the vagaries of the politically-driven spending review cycle which has encouraged a winner-takes-all short-termism wholly unsuited to the strategic cross-departmental approach needed to fix the broken funding system. Most concerning was the astonishing disconnect between the available funding and the costs of delivering a quality education and support system. Indeed, we were unable to determine whether the Department had a clear idea of how much money was needed to fund the various components of the school and college education system appropriately and efficiently. We suspected not.

We therefore call on the Department to develop a ten-year plan for education funding. This plan needs to focus on, at its core, what schools and colleges are expected to provide and the cost of doing so. It needs to recognise that education is a strategic national priority that has profound consequences across a wide range of social and economic policy issues. We expect the Department to engage in a frank conversation about what the education sector can and should deliver; develop a coherent vision of what it wants to achieve; and publish detailed bottom-up cost assessments in order to secure an adequate funding settlement from the Treasury. The Exchequer, for its part, must recognise the long-term value for money that would come with substantial investments to fix the underlying problems in an increasingly dysfunctional education funding system.

In addition, for the short- to medium-term we are calling on the Department to:

- urgently address underfunding in further education by increasing the base rate from £4,000 to at least £4,760 (amounting to around £970 million per year), rising in line with inflation;
- increase school funding by raising the age-weighted pupil unit value;
- increase high needs funding for special educational needs and disabilities to address a projected deficit of at least £1.2 billion, and ensure any funding uplift takes proper account of the costs of providing Education, Health and Care plans up to the age of 25;
- implement the full roll-out of the National Funding Formula as soon as feasible; make the various funding formulae more forward-looking and less reliant on historical factors; and investigate how best to account for the individual circumstances of outliers;
- develop an official statistics publication for school and college funding to provide greater clarity on the data and trends;

- grant Ofsted the powers to conduct inspections at MAT level, and require MATs to publish more detailed data on their financing structures;
- ensure all eligible students attract Pupil Premium and overcome existing barriers to automatic enrolment as a matter of priority;
- secure from the Treasury the full amount of estimated Pupil Premium money that has not been claimed because students did not register for free school meals, and allocate this money to disadvantaged children;
- extend Pupil Premium to provide for 16–19 year olds; and
- set out the timetable for providing apprenticeship transport subsidies, as per the Government’s manifesto commitments.

1 Introduction

1. We launched this inquiry on 19 April 2018 to examine the state of school and college funding in England. We received a large number of written submissions and took oral evidence from a range of stakeholders across schools and colleges, unions, sector experts, and officials from the Department for Education.
2. Throughout our inquiry we acknowledged the inextricable links between funding levels and operational or policy issues. In line with our terms of reference, we focused as far as possible on questions around the funding levels and mechanisms themselves. Our inquiry touched on a number of areas that deserved greater attention than was possible to cover in this Report. In some cases these were handled in separate inquiries, for example in our concurrent inquiry into Special educational needs and disabilities.¹ Other areas—for example off-rolling and school exclusions, or the role of multi-academy trusts—were examined in previous inquiries and may be examined in greater detail in future.²
3. We hope the results of our inquiry will be used to inform the upcoming spending review and support the Department in making the case for a more strategic approach to school and college funding.

1 Education Committee, [Special educational needs and disabilities](#), HC 342, 18 April 2018

2 See for example Education Committee, [Forgotten children: alternative provision and the scandal of ever increasing exclusions](#), 18 July 2018; Education Committee [Multi-academy trusts](#), HC 204, 22 February 2017

2 Funding pressures

Overview

4. Education has the second-largest public service expenditure in the UK, after health. Spending on school grants for 2018–19 accounted for around £50 billion,³ whilst 16–19 expenditure across sixth form colleges, general further education colleges, and schools with sixth forms accounted for £5.79 billion in 2016–17.⁴ We examined how this funding related to the requirements of the school and college system, and what improvements were needed.

5. Throughout our inquiry, we heard overwhelming evidence that schools and colleges were under considerable financial pressure,⁵ and that a long-term plan was needed to address the wide-ranging issues facing schools and colleges.⁶ Costs have increased across a range of areas, including annual pay award and salary raises,⁷ National Insurance, inflation, pensions, and SEND provision, amongst others.⁸ School funding has not kept pace. Total school spending per pupil fell by 8% in real terms between 2009–10 and 2017–18. This figure took account of the 5% increase in post 2009–10 school spending, the 55% reduction in local authority spending on schools (for example SEN and education-related services), and the 24% reduction in school sixth form funding.⁹ Research from the Institute for Fiscal Studies (IFS) indicated that funding was projected to be frozen in real terms between 2017–18 and 2019–20, with 2019–20 per pupil funding expected to be broadly equivalent to 2011–12 levels.¹⁰

6. Further education (FE) has been hardest hit. In 1990–91 per student funding for an FE or sixth form college was 50% greater than in secondary schools. It is now around 8% lower. By 2019–20 spending per student in FE will be similar to 2006–7 levels, while school sixth form spending will be lower than at any point since at least 2002.¹¹ Overall, the total size of the 16–19 education budget fell by 27% in real terms between 2010–11 and 2018–19, from £7.8 billion to £5.7 billion, excluding 16–18 apprenticeships. When apprenticeship funding is included, the reduction amounts to a 24% decline between 2010–11 and 2017–18, from £8.7 billion to £6.6 billion.¹²

7. Since 2010–11 an increasing number of schools have been struggling financially or going into deficit. Data on local authority maintained schools—which make up around

3 House of Commons Library, [Spending of the Department for Education](#), 25 February 2019, p2

4 House of Commons Library, [Spending of the Department for Education](#), 25 February 2019, p13

5 Qq2, 99, 158, 260. See also written evidence, for example London Councils ([FUN0094](#)) paras 5–26; Education Policy Institute ([FUN0064](#)) paras 2.1–2.3; Institute for Fiscal Studies ([FUN0082](#)) paras 2–11.

6 Q246

7 In April 2019 the Government confirmed it would fund the estimated £830 million cost of rising teachers' pensions contributions for 2019–20.

8 National Audit Office, [Financial sustainability of schools](#), HC 850, 14 December 2016, p7

9 Institute for Fiscal Studies, [2018 Annual Report on Education Spending in England](#), September 2018, pp 32–33. Note that this Report also makes use of data from sources published at different times, for example Education Policy Institute, [16–19 education: trends and implications](#), May 2019. Throughout this Report, the purpose has been to provide a balanced and representative picture of school and college funding, rather than generate like-for-like comparisons between different data sets.

10 Institute for Fiscal Studies ([FUN0082](#)) para 2

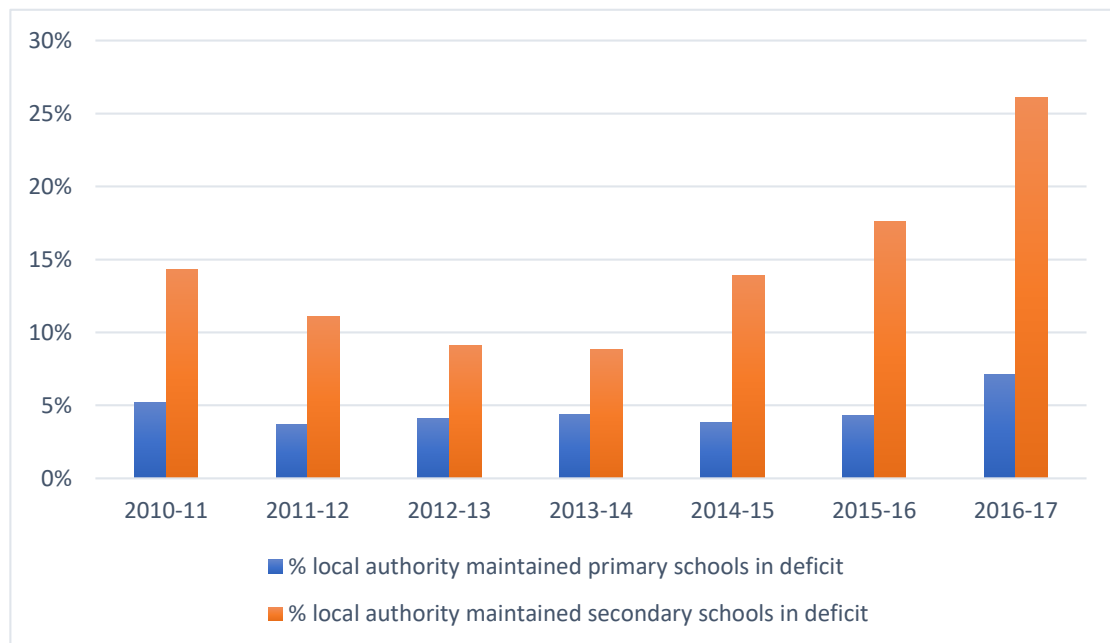
11 Institute for Fiscal Studies, [2018 annual report on education spending in England](#), Summary, 17 September 2018, p2; Institute for Fiscal Studies, [2018 annual report on education spending in England](#), 17 September 2018, p48

12 Education Policy Institute, [16–19 education: trends and implications](#), May 2019, p18

60% of state-funded schools¹³—show that secondary schools in particular have struggled: from 2013–14 to 2016–17, the proportion of local authority maintained secondary schools in deficit rose from 8.8% to 26.1% and the average deficit increased from £292,822 in 2010–11 to £373,990 in 2016–17.¹⁴ A number of surveys have indicated that parents have been asked to make regular financial contributions to support school budgets.¹⁵

8. Primary schools were in a comparatively better position, with the proportion of local authority maintained primary schools in deficit increasing from 5.2% in 2010–11 to 7.1% in 2016–17, and the average deficit rising from £72,042 in 2010–11 to £107,962 in 2016–17. Regional disparities have also persisted. The North East had the highest number of local authority maintained primary schools in deficit in 2016–17 at 10.1%, against 3.4% in the East of England.¹⁶ Comparable data on academy finances are not readily available. The Education Policy Institute’s analysis of National Audit Office (NAO) assessments noted that the proportion of academies in deficit remained comparatively low, though there was an “increase in the propensity [of academies] to have expenditure that exceeded income”, with 44.1% and 60.6% of primary and secondary academies respectively spending more than their income in 2014–15.¹⁷

Fig 1: Local authority maintained schools in deficit



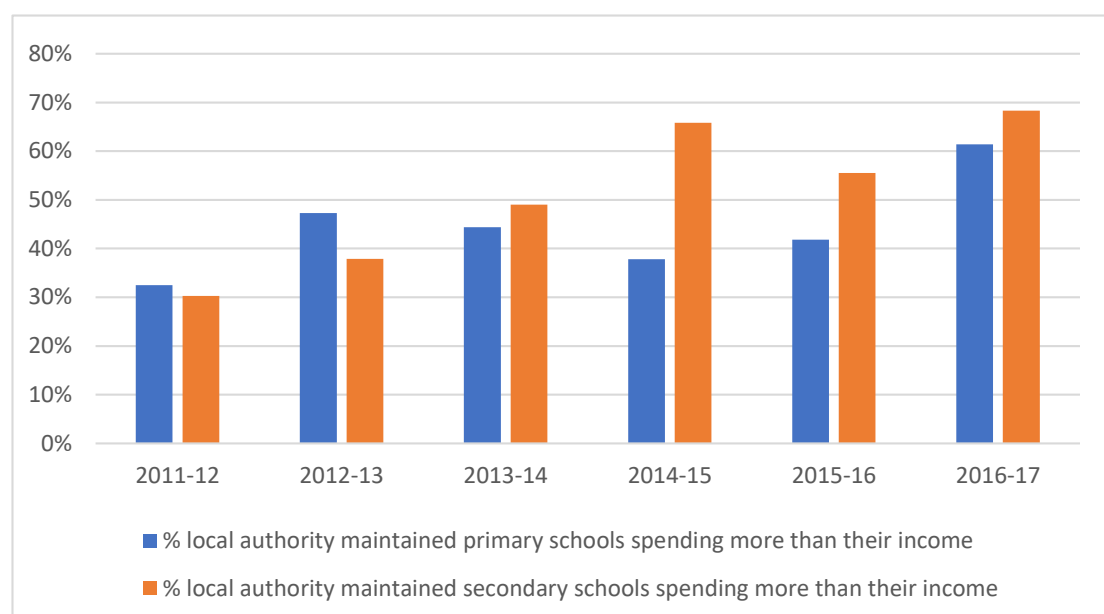
13 National Audit Office, [Converting maintained schools to academies](#), HC 720, 22 February 2018, p8

14 Education Policy Institute, [School funding pressures in England](#), March 2018, p5

15 Fair Funding for All Schools (FUN0030) para 23

16 Education Policy Institute, [School funding pressures in England](#), March 2018, p5

17 Education Policy Institute, [School funding pressures in England](#), March 2018, p24

Fig 2: Local authority maintained schools spending more than their income

Source: Education Committee analysis based on Education Policy Institute data¹⁸

9. In 2016 the National Audit Office warned that schools were being expected to make efficiency savings of £3 billion by 2019–20 through better procurement (£1.3 billion) and by using staff more efficiently (£1.7 billion).¹⁹ Both aims were seen as problematic,²⁰ given that the Department’s previous aspiration to reduce procurement spending by £1 billion in the previous Parliament was not met,²¹ and staff efficiencies risked cuts to staff numbers.²² The NAO observed that the Department’s statistical calculations indicated only that schools “should be able to make the required savings [...] but [it] cannot be assured that these savings will be achieved in practice”.²³ The NAO also highlighted the difficult capital funding landscape, stating that it would cost £6.7 billion to return all school buildings to satisfactory or better condition, and a further £7.1 billion to bring parts of school buildings from satisfactory to good condition.²⁴ A thorough assessment of the cost of removing asbestos from school buildings would also need to be taken into consideration.

Achieving education spending efficiencies and the use of consultants

10. During our inquiry we heard reports regarding the Department’s approach to achieving efficiencies in education spending. In 2018, the Department began piloting the use of contracted ‘school resource management advisers’ (SMRAs) who were sent to schools to identify resource efficiencies. In a speech to the Institute of School Business Leadership, the Parliamentary Under-Secretary of State for the School System, Lord

18 Education Policy Institute, [School funding pressures in England](#), March 2018

19 National Audit Office, [Financial sustainability of schools](#), HC 850, 14 December 2016, paras 1.11–1.12

20 Committee of Public Accounts, [Financial sustainability of schools](#), Forty-ninth Report of Session 2016–17, HC 890, pp5–7

21 National Audit Office, [Financial sustainability of schools](#), HC 850, 14 December 2016, paras 1.11–1.12

22 Education Policy Institute ([FUN0064](#)) para 1.5

23 National Audit Office, [Financial sustainability of schools](#), HC 850, 14 December 2016, p8

24 National Audit Office, [Capital funding for schools](#), HC1014, 22 February 2017, p10

Agnew, announced that the advisers had identified £35 million of wasted money or “essentially misdirected resources” across the 70 schools they had visited, averaging at £500,000 per school.²⁵ Lord Agnew described himself as “a pig hunting for truffles when it comes to finding waste in schools”, wagering a “bottle of champagne and a letter of commendation” that his team could find “some waste in your school”.²⁶ The Department earmarked a further £2.3 million to increase the number of SMRAs.²⁷

11. In March 2019, reports seen by Schools Week revealed that the Department’s resource management advisers had suggested cost-cutting options including limiting pupils’ lunch portions, keeping half of the money raised at charity events, replacing senior staff with less qualified staff on poorer contracts, and using spare staff to teach three classes at a time in the dining room.²⁸ In response, Lord Agnew said the resource management advisers should not be “framed as a cost-cutting initiative”, and rejected the notion that “the work of SRMAs does not have the interests of pupils at heart”.²⁹ When we raised the issue with Ministers during our evidence session, the Minister for School Standards, Rt Hon Nick Gibb MP, maintained the recommendations had been taken “out of context” and that it was

important that schools are using taxpayers’ money as effectively as possible. [School resource management advisers] are very skilled and can show schools how to use their money effectively to find efficiencies.³⁰

Government position on school and college funding levels

12. The Government has maintained that “there is more money going into our schools than ever before”.³¹ We heard real frustration regarding this position.³² Witnesses to our inquiry highlighted that, whilst the Government’s contention was factually accurate, it failed to capture the full picture. Funding had not kept pace with large increases in the pupil population size—which has been rising since 2010 and is expected to reach 7.698 million by 2024, up from 7.6 million in 2018—or the complexity of support requirements.³³ The Government’s contention also included targeted funding such as Pupil Premium which would not have benefited all schools in the same way.³⁴ More widely, we heard that schools had increasingly been asked to cover additional services—including pupil mental health, radicalisation checks, monitoring health and social issues, mentoring new teachers and so forth—without commensurate funding increases to cover the additional resources required.³⁵

13. A multi-billion pound funding uplift would be needed to address the myriad issues facing schools and colleges, though the precise figure remains unclear. Simply reversing the 8% school funding gap would require a £3.8 billion uplift, based on a 2019–20 schools

25 Tes, [Exclusive: ‘Colossal’ £500,000 wasted per school claims minister](#), 21 November 2018

26 Schools Week, [Minister bets heads a bottle of champagne he can find savings in their schools](#), 21 November 2018

27 Schools Week, [DfE to spend 2.3 million on new army of cost cutting consultants](#), 30 August 2018

28 Schools Week, [Limit pupils’ lunch portions to save money, say Agnew’s cost-cutting advisers](#), 28 March 2019

29 Schools Week, [If schools want more money from government, they must use funds efficiently](#), 15 April 2019

30 Q476

31 GOV.UK, [Education in the media: funding](#), 28 September 2018

32 WorthLess? (FUN0100) para 13; National Education Union (FUN0073) para 12

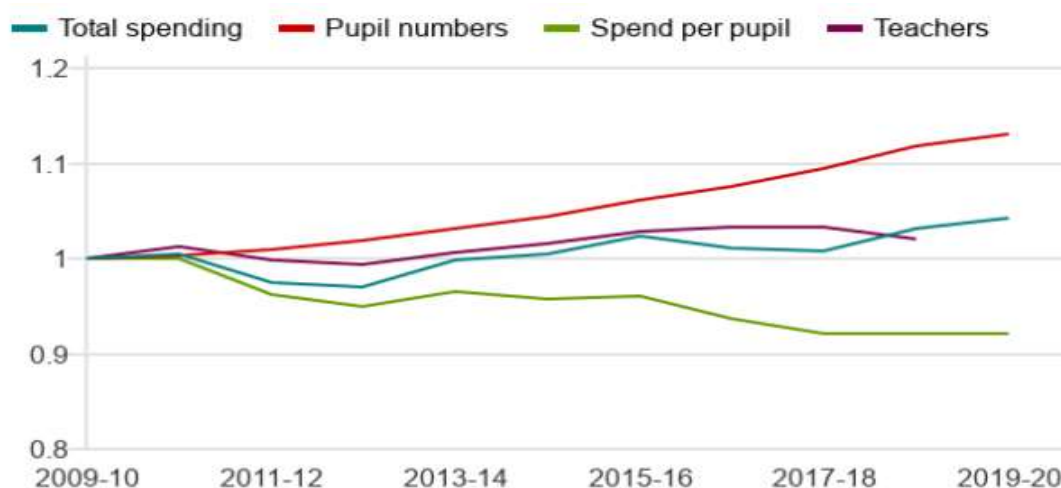
33 Department for Education, [National pupil projections - future trends in pupil numbers](#), 12 July 2018, p4; Q1

34 Q2

35 Qq1–3

funding budget of circa £44 billion, though this would not reflect more subjective judgements of what schools require.³⁶ We discuss such funding requirements in greater detail in Chapter 7.

Fig 3: The population boom: total school spending in England, pupil numbers, teachers, and spending per pupil relative to 2009 levels



Source: IFS analysis commissioned by BBC³⁷

14. We asked the Minister for School Standards why the Department had maintained the ‘more money than ever’ line for so long when the evidence showed schools were suffering from real-terms reductions in per pupil funding.³⁸ He noted the difficult state of public finances going back to the 2008 financial crash,³⁹ but said the Department had

always acknowledged that schools are facing cost pressures, but [...] the facts are that between 2010 and 2015 there was a real-terms protection per pupil, and that from 2017 onwards we are increasing the amount of funding for every pupil in every school.⁴⁰

15. We noted the evolution of the Government’s rhetoric in this regard. In response to a critical 2017 report by the Committee of Public Accounts on school funding, for example, the Department stressed that school funding was at the “highest level on record”⁴¹ and believed that its funding commitments meant “the future challenge for the system as a whole [will be] more about maximising the impact of resources [...] rather than managing cost pressures”.⁴²

16. In 2018, the Secretary of State continued to herald the “record investment we are making in schools”,⁴³ whilst noting that “[o]f course, I recognise that pupil numbers are

36 Institute for Fiscal Studies, [Extra spending on education in England – the numbers explained](#), 18 June 2019

37 BBC, [Seven charts on the £73,000 cost of educating a child](#), 19 November 2018

38 Qq349–50

39 Q352

40 Q349

41 GOV.UK, Blog, [Education in the media](#), 29 March 2017

42 HM Treasury, [Government response to the Forty Ninth Report of Session 2016–17, Department for Education: Financial sustainability of schools](#), Cm0595, para 1.2

43 [HC Deb](#), 13 November 2018, vol 649, col 243

rising, we are asking schools to do more and schools are facing cost pressures”.⁴⁴ In a 2019 speech at the Association of School and College Leaders annual conference, the Secretary of State said he had “heard the message on funding loud and clear”.⁴⁵

17. We therefore pressed the Ministers for details on how the Department was actually going to tackle the school and college funding crisis. The Minister for School Standards noted the opportunities presented by the upcoming spending review, acknowledging that the Treasury had to “balance competing demands” but insisting that the Department would “present [its] case in the most effective way possible”.⁴⁶

18. We are pleased that the Department is beginning to acknowledge the significant financial strain that schools and colleges are under. There is simply not enough core funding, and the capital funding landscape is becoming increasingly concerning. The Department’s recognition of this problem now needs to be translated into significant funding increases.

19. *The Department must make the strongest possible case to the Treasury for a multi-billion pound funding increase in the next spending review, and ensure this is aligned with the requirements for a ten-year plan as set out in Chapter 7 of this Report.*

20. We heard disturbing reports that the Department was spending millions on ‘school resource management advisers’ whose cost-saving suggestions included keeping money raised at charity events, cutting children’s food portions, and using spare staff to cover three simultaneous classes in a school dining hall. The Minister said these recommendations had been taken “out of context”. We call on the Department to release the full reports to us, to show the context in which the recommendations were made.

21. *In response to this Report, the Department should provide us with the full documents described by Schools Week, a breakdown by category of the measures suggested by school resource management advisers across the country, how much the resource advisers cost, and an evaluation of the long-term value for money provided by their cost-saving recommendations.*

The Department’s use of data

22. The accuracy of education spending data, and the Department’s interpretation of it in particular, has been the subject of controversy.⁴⁷ For example, the Department has repeatedly cited the Institute for Fiscal Studies when stating that “real-terms per-pupil funding for five- to 16-year-olds in 2020 will be more than 50% higher than it was in 2000”.⁴⁸ Whilst this was not untrue, the wider context in the IFS data provided a more representative breakdown. The IFS report stated that “primary and secondary school spending per pupil rose by over 50% in real terms between 2000–01 and 2010–11”. The very next paragraph stated that “[t]otal school spending per pupil fell by 8% in real terms

44 Rt Hon Damian Hinds MP, [correspondence with the Chair of the UK Statistics Authority](#), 8 October 2018

45 GOV.UK, [Damian Hinds speech at the Association of School and College Leaders’ annual conference 2019](#), 15 March 2019

46 Q345

47 See for example Independent, [Education Secretary forced to admit that he wrongly claimed school spending is going up](#), 14 March 2018

48 Quotation from [HC Deb](#), 13 November 2018, vol 649 col 246. See also Education Committee, [Oral evidence: school and college funding](#), HC 969, 3 April 2019, Q333; [HC Deb](#), 25 April 2019, vol 658, col 970.

between 2009–10 and 2017–18, and will only be about 14% higher in real terms in 2017–18 than in 2003–04”.⁴⁹ We noted that such context did not appear have featured particularly prominently in the Department’s communications.⁵⁰

23. In October 2018 the UK Statistics Authority (UK SA) wrote to the Department outlining concerns over its use of various school funding statistics in public communications and the lack of context, stating that

figures were presented in such a way as to misrepresent changes in school funding [...] school spending figures were exaggerated [...] The result was to give a more favourable picture.⁵¹

24. The UK SA urged the Department to develop an official statistics publication for school funding to make it “easier for the Department to refer to a respected and consistent source. It would enable people to be confident that figures used had been subject to quality assurance and would enable them to explore any known quality issue”.⁵²

25. Publicly available data on school funding is extremely varied and subject to different calculations from a variety of sources. We are concerned this confusion can be exploited to portray a misleading picture. Having a single, reliable resource provided via an easily accessible official statistics publication would help resolve ongoing disputes over funding levels and how they are calculated. We are confident that the Department would welcome the additional transparency and public confidence that such a resource would bring.

26. *The Department should develop an official statistics publication for school and college funding.*

49 Institute for Fiscal Studies, [2018 Annual Report on Education Spending in England](#), September 2018, p7

50 [HC Deb](#), 13 November 2018, vol 649 col 246; Education Committee, [Oral evidence: school and college funding](#), HC 969, 3 April 2019, Q333

51 UK Statistics Authority, [correspondence with the Rt Hon Damian Hinds MP](#), 8 October 2018

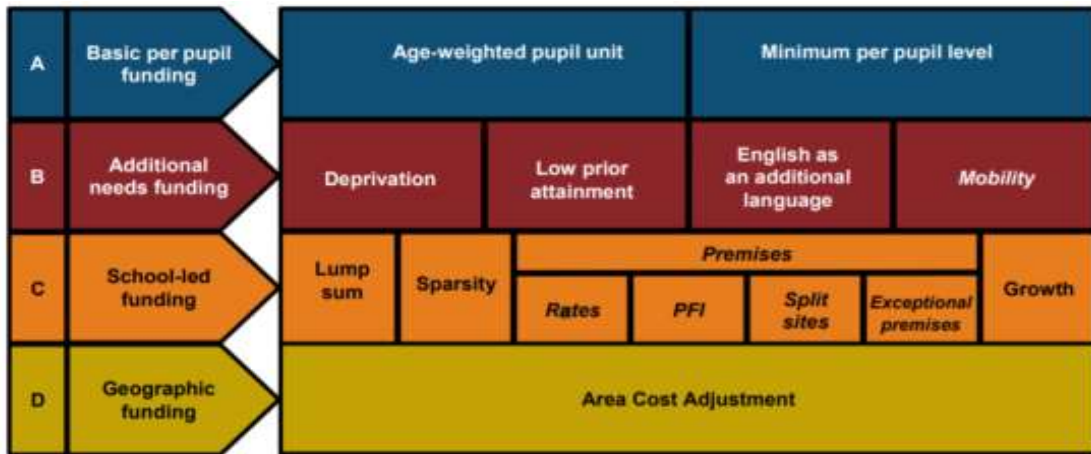
52 UK Statistics Authority, [correspondence with Jonathan Slater, Annex A](#), 30 May 2019

3 Core school funding

Background

27. The main source of revenue for 5–16 school funding comes from the dedicated schools grant (DSG), which is notionally divided into schools, early years, and high needs funding blocks.⁵³ Since the introduction of the National Funding Formula (NFF) from April 2018, the size of each block has been determined by a specific formula.⁵⁴ The formula for schools included a set of 14 weighted factors to calculate funding distributions. For the year 2019–20 the basic per-pupil funding was weighted at 73.%, whilst the additional needs and school-led funding accounted for 17.6% and 8.8% respectively.⁵⁵

Fig 4: Department’s graphic on factors in the schools National Funding Formula (not to scale)



Funding for factors in italics will be allocated to local authorities in 2019–20 on the basis of historical spend. Source: Department for Education.⁵⁶

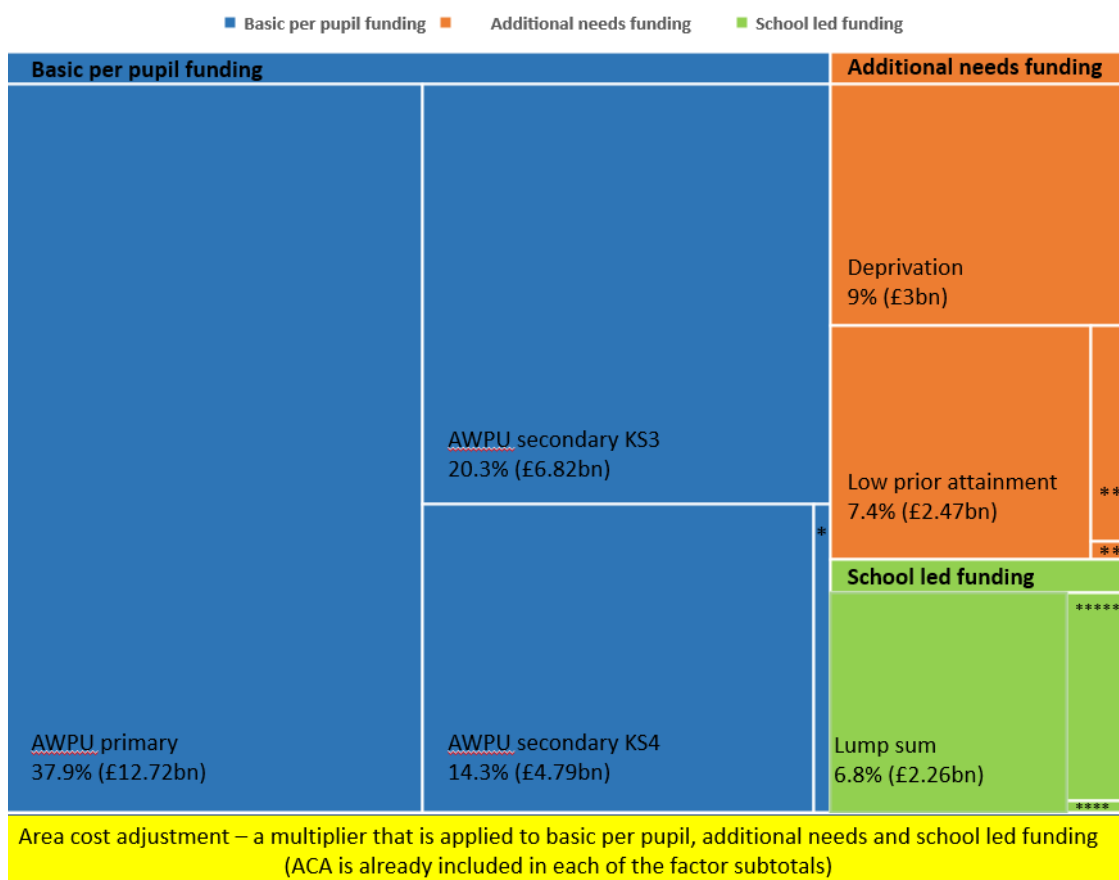
53 For 2018–19 onwards, the Government introduced a fourth block, the central schools services block, which is funding allocated to local authorities to carry out central functions on behalf of pupils; it was created by combining two previous funding streams.

54 The early years block which was allocated on a national funding formula basis for the first time in 2017–18. See Department for Education, [The National Funding Formula for Schools and High Needs: Policy Document](#), September 2017, p7

55 For further information on these factors, see: Department for Education, [The National Funding Formula for Schools and High Needs: Policy Document](#), September 2017, pp 11–21. For the unit values, total funding and proportion of spend through each factor in the 2019–20 formula, see: Department for Education, [The National Funding Formulae for Schools and High Needs 2019 to 2020](#), July 2018, p10

56 Department for Education, [The national funding formulae for schools and high needs 2019 to 2020](#), July 2018, p5

Fig 5: National Funding Formula: graphic representation of weightings



* Minimum per pupil funding: 0.6% (£187m) / ** English as an additional language: 1.2% (£407m) / *** Mobility: 0.1% (£21m) / **** Sparsity: 0.1% (£25m) / ***** Premises: 1.9% (£641m)

Source: Education Committee analysis using Department data⁵⁷

28. The NFF represented a substantial change from previous years, when funding allocations were chiefly determined by looking at local authority spending in the previous year,⁵⁸ which in turn was based on central Government allocations that were themselves largely influenced by the characteristics of the local authority in the early 2000s.⁵⁹ This approach resulted in significant regional variations, some of which were intentional (for example London weightings) whilst others appeared to be more the result of accumulated historical decisions.⁶⁰ An overhaul of the funding system was pledged by the Conservative Government in 2015 and in the 2017 Conservative Party manifesto.⁶¹

29. The NFF was accordingly introduced to make funding more transparent, and address funding variances between schools and pupils with similar characteristics. Announcing

57 Department for Education, [The national funding formulae for schools and high needs 2019 to 2020](#), July 2018, p10

58 Education and Skills Funding Agency, [Dedicated Schools Grant: Technical Note 2016 to 2017](#), December 2015, p4

59 Institute for Fiscal Studies, [School Funding Reform in England: a smaller step towards a more sensible system, will the final leap ever be made?](#), 21 September 2017

60 Ibid.

61 Conservative Party, [Conservative Party Manifesto 2017](#), 18 May 2017, p51; and Department for Education, [The National Funding Formula for Schools and High Needs: Policy Document](#), September 2017, p3

the policy, then Secretary of State Justine Greening said the NFF would direct resources to where they were most needed and address “manifest unfairness” under the existing system:

for the first time, the resources that the Government are investing in our schools will be distributed according to a formula based on the individual needs and characteristics of every school in the country.⁶²

30. To provide stability for schools and local authorities during the transition period, the Department planned for local authorities to continue setting a local formula to determine funding distribution and individual school budgets in their areas up to 2019–20. Under the so-called ‘soft formula’, local authorities continue to play a role in shaping the size and allocation of budgets to schools.⁶³ The next stage in the NFF policy plan involved moving to the ‘hard formula’, under which a single national formula would set school budgets. This would have the effect of largely cutting local authorities out of the allocation and distribution process.⁶⁴ This would require legislation, however, and its implementation has been delayed. The Department confirmed the soft formula would continue in 2020–21.⁶⁵

Practical implementation

31. Our evidence on the intentions behind the NFF was largely positive, though views on the level of local flexibility were more mixed. We heard from councils that the current soft formula could capture local complexities and provide flexibility for appropriate interventions much better than the hard formula.⁶⁶ The National Education Union also supported a soft formula, arguing that “no ‘hard’ national funding formula can account for, quantify or respond to every local circumstance”.⁶⁷ The Local Government Association said that a future formula would need to include an ongoing element of flexibility allowing councils to adjust distributions “if that produces better outcomes for schools and pupils”.⁶⁸ On the other hand, we heard that existing local flexibilities had led to different decisions being taken by different local authorities in objectively similar circumstances. The National Association of Head Teachers (NAHT) believed that a continuation of the soft formula risked perpetuating funding anomalies within a distribution system that was based more on location than actual levels of need.⁶⁹

32. More widely, our evidence highlighted deep concerns about the level of funding required to make the new system ‘fairer’, as opposed to purely redistributive. In particular, we heard that age-weighted pupil unit (AWPU)—which comprises the bulk of the NFF spend—and the lump sum were too low; allocations were not based on assessments of need levels or operational costs; and there was little clarity around what the lump sum

62 [HC Deb](#), 14 September 2017, vol 628 cols 1024–7

63 Department for Education, Department for Education, [The National Funding Formula for Schools and High Needs: Policy Document](#), September 2017, p8

64 Department for Education, [The National Funding Formula for Schools and High Needs: Policy Document](#), September 2017, para 10

65 Department for Education, [The national funding formulae for schools and high needs 2019 to 2020](#), July 2018, para 5

66 The Local Government Association ([FUN0055](#)) paras 2.4, 6.1; Hampshire County Council ([FUN0060](#)) para 3.2; Staffordshire County Council ([FUN0062](#)) para 11; National Education Union ([FUN0073](#)) para 6; County Councils Network ([FUN0076](#)) para 41; UNISON ([FUN0081](#)) para 4.3

67 National Education Union ([FUN0073](#)) para 6

68 The Local Government Association ([FUN0055](#)) para 6.1

69 NAHT ([FUN0054](#)) para 30

and AWPU were intended to cover.⁷⁰ Regarding the budgets set for schools, Luke Sibieta from the IFS explained that different decisions were taken among local authorities on the weighting of primary and secondary school funding, though the underlying reasoning was not always clear. The Department had then replicated the average of these local formulae to minimise turbulence:

they took that decision because they were not aware of any evidence that it should move one way or the other. It does not necessarily mean it is the right level.⁷¹

33. The funding formula was also criticised for providing insufficient financial increases to schools in historically underfunded areas.⁷² These issues, together with the inclusion of historical factors within the NFF, did not appear to support the Government’s contention that the new system offered a “fairer” funding model.⁷³ When questioned on this matter, the Minister for School Standards maintained that the NFF was

a much fairer way of distributing funding because previously we were basing the distribution of funds to local authorities on historic[al] data [...] the first thing is that we are [now] basing the national funding formula on current, up-to-date data.⁷⁴

34. He acknowledged that the age-weighted per pupil funding formula was “broadly speaking, roughly the aggregation of 150 local formulae”, which were adjusted slightly to account for issues such as low prior attainment.⁷⁵ Regarding adjustments to the weighting, he argued that

if you think then that the 73% of the national funding formula that is the age-weighted pupil unit is too low and you think it should be 75% or 80%, the beauty of the national funding formula is that we can have this debate nationally.⁷⁶

35. Given the concerns over the insufficient size of the total funding pot in question, however, we highlighted the amount of money that went into seemingly disparate Departmental projects and asked whether this would not be better spent on increasing the core funding pot to aid financial stability and strategic planning.⁷⁷ The Minister said such funding announcements typically arose when the Department became aware of spare money mid-financial year, or during the roll-out of national programmes.⁷⁸ He stressed that the Department would be “presenting the best case possible to Treasury for

70 f40 Group of Authorities ([FUN0040](#)) para 7.1; Grammar School Heads’ Association ([FUN0020](#)) para 5; Northamptonshire County Council ([FUN0042](#)) paras 2.3–2.7; NAHT ([FUN0054](#)) para 32; Cambridgeshire County Council ([FUN0078](#)) para 2.6; Morris Education Trust ([FUN0087](#)) para 3.3; Cambridgeshire Schools Forum ([FUN0037](#)) para 8

71 Q66

72 Hampshire County Council ([FUN0060](#)) para 3.1; North Yorkshire County Council ([FUN0061](#)) para 2; National Education Union ([FUN0073](#)) para 39; WorthLess? ([FUN0100](#)) paras 10–11

73 Q472; Essex County Council ([FUN0016](#)) para 11; f40 Group of Authorities ([FUN0040](#)) paras 2.1, 4.1; Hampshire County Council ([FUN0060](#)) paras 3.1, 3.6

74 Q471

75 *Ibid.*

76 *Ibid.*

77 Q473

78 *Ibid.*

the future years of the spending review”.⁷⁹ Regarding the delayed roll-out of the hard formula, the Minister said the intention was to move to a hard formula “eventually”, but that local authorities would continue to distribute funding up to 2020–21 in the interests of providing flexibility.⁸⁰

36. We fully support the intentions behind the National Funding Formula (NFF), and it is clear to us that maintaining a degree of local flexibility is important. We are nevertheless concerned that the so-called ‘soft’ formula continues to be based on local historical rates that perpetuate the anomalies it was supposed to remove. These historical factors hamper the NFF’s potential to act as a truly redistributive tool.

37. The Department should bring forward legislative proposals to implement a ‘hard’ National Funding Formula for schools as soon as a parliamentary majority is available. We encourage the Department to investigate how best to address outliers whose individual circumstances might not be accurately captured by even the best-designed funding formula.

38. Schools require an urgent funding increase. The age-weighted pupil unit (AWPU) funding in the NFF is set too low.

39. The Department must raise the AWPU for the next spending review period. The Department must also commit to revising the AWPU again following a comprehensive review of the real-world costs of school education, as recommended in Chapter 7.

National Funding Formula and multi-academy trusts

40. The Department’s intention to secure consistent funding across schools via the NFF has been further complicated by the organisational structure of multi-academy trusts (MATs).⁸¹ In 2018 the Department published figures on academy trust finances indicating that financial assessments of MATs were being conducted on the trust level, rather than at the individual academy level. The Department said this was “because trusts are the legal entities responsible for academies, including their finances”.⁸²

41. As the Education Policy Institute highlighted, however, trusts pooled resources and allocated school funding levels for individual academies with little Departmental oversight. This undermined a key feature of the NFF’s redistributive approach, and weakened the transparency and consistency that the policy was intended to provide.⁸³ School Financial Success said there was “no justification” for allowing MATs to continue with this freedom whilst removing it from local authorities under a hard formula, and called on the Department to reassess its position on MAT funding policy.⁸⁴

42. The lack of clarity over MAT funding systems was also criticised. MATs have typically funded their core operations by top-slicing a percentage of the budgets from schools within their trust. Concerns have been raised in the past about where this money

79 Q501

80 Q472

81 MATs are single legal entities that run more than one academy – typically between one and ten, though some cover 40 or more schools.

82 Department for Education, [Academy revenue reserves for 2016 to 2017](#), July 2018, p1

83 Education Policy Institute, [Analysis: Why new DfE statistics may be concealing the number of academies in financial difficulties](#), 27 July 2018

84 School Financial Success ([FUN0057](#)) paras 13–15

came from. There have been multiple cases of MATs increasing their service charges when their schools were already in deficit,⁸⁵ or including Pupil Premium funding in the management fee.⁸⁶ The NASUWT union said the freedoms and flexibilities of the current funding framework meant there was “no guarantee within the system” that education funding would be spent to the benefit of pupils,⁸⁷ and criticised the “inadequate level of DfE scrutiny and therefore public accountability of spending by academy trusts”.⁸⁸ High profile cases of asset stripping, whereby MATs transferred substantial financial assets from schools to themselves before collapsing, have raised additional worries around appropriate levels of oversight.⁸⁹

43. We had further concerns about the wider issue of accountability within MATs, given that Ofsted had neither the powers nor the capacity to inspect individual MATs or give them ratings. A 2017 report by our predecessor committee criticised the lack of formal inspection and accountability under Ofsted’s policy of conducting batched inspections of individual schools within trusts over a single week.⁹⁰ We also wrote to Lord Agnew in early 2018 outlining our ongoing concerns.⁹¹ Since then, HM Chief Inspector Amanda Spielman told us on 7 March 2018 that she “absolutely” believed Ofsted should be empowered to inspect MATs, and that “accountability systems need to reflect the way that the system actually operates today”.⁹²

44. In December 2018, Ofsted said it would amend its approach to inspecting schools within MATs, conducting inspections across one or two terms and working with MAT leaders to “evaluate the educational effectiveness of the MAT as a whole”.⁹³ In evidence to us in February 2019, the HM Chief Inspector re-iterated her call for MAT inspections, arguing that the recent changes did not go far enough:

if decisions about behaviour policy or curriculum or how teachers are trained and supported is happening at a level above the school in an organisation then that for me is where the conversation needs to be.

[... The] summary evaluations that we have introduced in the last couple of months [...] take us a step in that direction but there is still space to do something that gets to the critical points, decision-making points in an organisation, more quickly and more easily.⁹⁴

45. The Department must ensure that multi-academy trusts (MATs) are properly held to account over their internal operations, the way they fund themselves, and how they distribute funding to schools within their trust. We are not convinced that the current framework is adequate. *The Department should confirm in response to this Report*

85 Schools Week, [Academy trust top-sliced £376k from school with £1m deficit](#), 17 May 2019

86 Schools Week, [How much are academy trusts top-slicing from schools?](#), 27 May 2016

87 NASUWT, [The NASUWT submission to the House of Commons Education Select Committee](#), 30 May 2018, para 4

88 NASUWT, [The NASUWT submission to the House of Commons Education Select Committee](#), 30 May 2018, para 11

89 Education Committee, [correspondence with the Parliamentary Under Secretary of State for the School System](#), 15 January 2018

90 Education Committee, [Multi-academy trusts](#), Seventh Report of Session 2016–17, HC 204, 28 February 2017, para 27

91 Education Committee, [correspondence with Lord Agnew](#), 15 January 2018; [correspondence with Lord Agnew](#), 15 February 2018

92 Education Committee, [Oral evidence: Accountability hearings](#), HC 341, 7 March 2018, Q621

93 GOV.UK, Ofsted blog, [A new approach to evaluating the work of multi-academy trusts](#), 13 December 2018

94 Education Committee, [Oral evidence: Accountability hearings](#), HC 341, 5 February 2019, Q1782

whether, under a hard funding formula, MATs would continue to maintain discretion over allocating funds to schools within their trusts. If they would, the Department must explain how it intends to ensure this system does not undermine the NFF's core aim of providing equitable and consistent funding across schools.

46. Ofsted should be granted the powers and resources to conduct inspections at MAT level. The Department should also require MATs to publish detailed, accessible data on their website showing how they fund themselves, where this money comes from, and a breakdown of what it is spent on. These publications should be combined with performance indicators to support oversight by authorities and parents.

4 Post-16 education funding

Overview

47. Our evidence on the state of post-16 education funding painted a troubling picture. Participation in full time further education (FE) has more than doubled since the 1980s.⁹⁵ Yet across 16–19 education, funding per student fell by a full 16% in real terms between 2010–11 and 2018–19. This is twice as much as the 8% school funding fall over a similar period.⁹⁶ The total size of 16–19 education funding fell by 27% in real terms, from £7.8 billion to £5.7 billion, between 2010–11 and 2018–19.⁹⁷ These pressures were set against the context of rising demand from increased pupil populations, more complex special educational needs (SEN) requirements, inflation, teacher pay costs, curriculum changes, and pressure to raise standards.⁹⁸

48. Budget squeezes across post-16 education institutions have not been uniform. Funding per 16–19 full-time equivalent student in the further education sector fell by 18% between 2010–11 and 2018–19, whereas school sixth forms experienced a 26% decline. Funding per student in FE colleges fell by 9% between 2012–13 and 2018–19, whilst sixth form colleges fell by 15% – a difference attributable to a disproportionately high number of disadvantaged students going to FE colleges, which then attract a funding weighting to support more challenging intakes.⁹⁹ The historical differences between academic and vocational further education funding were also pronounced. On average, in 2014 OECD countries spent 8% more on vocational programmes than on academic ones; the UK spent 11% less.¹⁰⁰ The Institute for Fiscal Studies (IFS) said FE per student funding in 2019–20 was projected to be similar to 1990–91 levels – a situation described as “remarkable” given the economic and public spending increases over the past 30 years.¹⁰¹

49. The Government’s well-publicised funding commitments to T levels will not address the scale of these budget pressures. Whilst the substantial T level funding commitments have been widely welcomed, they would be offset by proposed reductions to the rest of further education college budgets. Per student spending has therefore been projected to be held constant up to 2019–20, rather than rise significantly. As the IFS noted, the extra money was also earmarked for additional teaching hours and was therefore “unlikely to ease the resource challenges on the sector”.¹⁰²

Impacts and implications

50. The impacts of these budgetary pressures have been significant. The amount of guided learning hours for 16–19 pupils fell from 730 hours to 665 hours per student between 2012–

95 Institute for Fiscal Studies, [2018 Annual Report on Education Spending in England](#), September 2018, p38

96 This figure excludes apprenticeship funding. Including apprenticeship funding would bring the figure to a 14% reduction by 2017–18. For details of the calculations see Education Policy Institute, [16–19 education: trends and implications](#), 13 May 2019, pp18–21

97 Education Policy Institute, [16–19 education: trends and implications](#), May 2019, pp7, 18. Note that this figure excludes apprenticeship funding. If included, the reduction amounts to 24% between 2010–11 and 2017–18.

98 Association of Colleges ([FUN0026](#)) para 5

99 Education Policy Institute, [16–19 education funding: trends and implications](#), May 2019, p7

100 Education Policy Institute ([FUN0064](#)) para 9.2

101 Institute for Fiscal Studies ([FUN0082](#)) para 11. See also Institute for Fiscal Studies, [Comparison of parties’ plans for education spending on 16–18 year-olds in England](#), 1 June 2017. Note the comparison using 2017–18 prices.

102 Institute for Fiscal Studies, [2018 Annual Report on Education Spending in England](#), September 2018, p48

13 and 2016–17 – a reduction of 9%.¹⁰³ The Sixth Form Colleges Association told us that funding pressures had led 50% of schools and colleges to drop foreign language classes, 34% had cut STEM courses, 67% had reduced support or extra-curricular services, and 77% were teaching larger classes. In addition, the institutions were increasingly having to stretch resources to deal with additional issues including mental health, duties under the Prevent programme, and meeting Gatsby career benchmarks,¹⁰⁴ as well as providing front line support following NHS and local authority funding pressures.¹⁰⁵ We also heard that schools were having to subsidise their sixth forms using their Key Stage 3 and 4 incomes, with knock-on impacts on staff recruitment and the resources available to the rest of the school.¹⁰⁶

51. We were particularly concerned about the social justice consequences of squeezed FE budgets. Twice as many disadvantaged 16 to 18 year-olds go to further education colleges than school sixth forms. Disadvantaged students have fewer opportunities to supplement deficient education or support services through private means,¹⁰⁷ and we heard that FE colleges' disadvantage funding was not ringfenced and was being stretched across multiple competing groups.¹⁰⁸ The Social Mobility Commission's State of the Nation 2019 report found that the clustering of disadvantaged students in FE had "fuelled the image of the sector being for 'other people' who 'fail at school'".¹⁰⁹ Luke Sibieta said the FE funding dip was a "crazy" approach to financing education, given the importance of FE and sixth form colleges in providing a gateway to future success in higher education and the labour market.¹¹⁰

52. We asked witnesses why further education in particular had been hit so hard. James Kewin of the Sixth Form Colleges Association believed it was a political decision:

there are more votes in schools than colleges [...] there is no sound educational reason why there should be such a sharp drop at the age of 16 in education funding [...] There is no good reason why a young person in England gets 15 hours of education compared to 25 hours internationally.¹¹¹

53. Emily Chapman of the National Union of Students said FE "[didn't] have the political voice of, say, the universities", and had struggled as a result.¹¹² Dr Birkinshaw, former President of the Association of Colleges, noted that the FE sector was not so much overlooked by the political establishment as kept in a state of "almost permanent revolution".¹¹³ She criticised the Department's approach to directing funding at the eye-catching areas whilst core funding was kept "at an all-time low. That means we cannot

103 Education Policy Institute, [16–19 education funding: trends and implications](#), May 2019, p8

104 The Gatsby Benchmarks are a framework of eight guidelines that define the best careers provision in schools and colleges.

105 Sixth Form Colleges Association ([FUN0041](#)) paras 9–10

106 St Laurence School ([FUN0039](#)) para 14

107 Social Mobility Commission, [State of the National 2019: Social Mobility in Great Britain](#), April 2019, pp60, 68–70

108 Association of Colleges ([SCN0492](#)) para 18; Gateshead College ([FUN0027](#)) paras 5.1–5.3

109 Social Mobility Commission, [State of the National 2019: Social Mobility in Great Britain](#), April 2019, p 66

110 Q51

111 Q83

112 Q84

113 Q87. Significant developments have included the introduction and expansion of T levels, the apprenticeship levy and reforms, the introduction of Institutes of Technology, the review of level 4 and 5 qualifications, the review of post-16 level 3 and below qualifications, the Government's focus in its industrial strategy on addressing the productivity gap, and assessments of the impact of the UK's decision to leave the European Union.

do our job”.¹¹⁴ James Kewin agreed, arguing that “politically motivated uplifts” did more harm than good since they allowed the Government to rebut calls for more investment by pointing to recent initiatives:

too much of what we see in 16 to 18 now starts with the press release and works back [...] This kind of policy by press release is quite damaging and the much more mundane reality is we just need a higher rate of funding.¹¹⁵

54. Witnesses from the further education sector were clear that the first priority for the spending review should be a core funding rate increase, which had been held at £4,000 for 16 and 17 year-olds since 2013–14.¹¹⁶ James Kewin called for a base rate of £4,760 per year which would amount to an increase of around £970 million per year.¹¹⁷ According to analysis commissioned from London Economics, this was needed to increase student services to minimum required levels, protect minority subjects at risk of being cut, and increase non-qualification time (for example extra-curricular activities and work experience).¹¹⁸

55. Several additional areas were highlighted. Funding for English and maths retakes featured prominently.¹¹⁹ Other areas included separate funding for increases in teachers’ pay awards and pensions, a greater capital expansion fund for 16 to 18 education;¹²⁰ investment in a well-rounded education that covered mental health support, education for parents about careers prospects outside the university route, civic engagement, and giving students a voice;¹²¹ addressing the current gap in progression routes, and developing technical education qualifications fit for the future.¹²²

56. Following the conclusion of our oral evidence, a raft of suggested reforms to the further education sector were published under the review of post-18 education and funding led by Philip Augar.¹²³ The Secretary of State said the Department would “look carefully at each recommendation in turn and in the round to reach a view on what will best support students and the institutions they study at”.¹²⁴

Government position

57. We questioned the Ministers on the reasons behind the post-16 funding pressures and how the problem should be tackled. The Minister for School Standards said that the Government understood the challenges schools and colleges were facing, and was doing its best in the context of a difficult financial situation following the 2008 financial crisis.¹²⁵

114 Q87

115 *Ibid.*

116 Qq89–90. The rate for 18-year olds was changed to £3,300 from 2014–15. See GOV.UK, [16–19 funding: how it works](#), for further details on the banding for national funding rates.

117 Based on 2018–19 total programme funding for 16 to 19 funding allocation of circa £5.1 billion. See GOV.UK, [16 to 19 allocation data: 2018 to 2019 academic year](#), 22 October 2018.

118 Q106; London Economics, [Understanding the funding shortfall in sixth form education](#), October 2018, p2. See also Association of Colleges on 16-to-18 funding requirements: Association of Colleges, [Autumn Budget 2018](#), 28 September 2018, p5; Q109

119 Qq92, 97, 110

120 Qq100, 101

121 Q101

122 Q113

123 GOV.UK, [Post-18 review of education and funding: independent panel report](#), May 2019

124 [HC Deb](#), 4 June 2019, vol 661 col 56

125 Q333

He noted that the Government had not been able to protect post-16 funding, echoing statements he made to our predecessor Committee that there had been a “very conscious policy decision” in 2010 to prioritise 5-to-16 school funding “because all the evidence is that attainment in that period determines the life chances of pupils after the age of 16”.¹²⁶

58. We were pleased when the Minister for Skills and Apprenticeships Anne Milton MP informed us of her intention to “put [her] tin hat on and go into battle to fight” for increased FE funding.¹²⁷ The Minister confirmed that “the first thing I would like to see is the base rate rise” (though she did not provide precise figures), and agreed there needed to be greater support for post-16 mental health services.¹²⁸ She also said social justice and productivity should feature prominently when making a funding case to Treasury, highlighting the links between educational attainment and success in later life, and the number of people “who without a doubt have skills and talents and could be productive members of society” but did not have the right opportunities to do so.¹²⁹

59. Post-16 education has been cut to the core. We note the Minister’s position about post-financial crash difficulties. Other sectors have however moved on. The continued underfunding of this pivotal stage in education is longer justifiable. These budget pressures are the result of political decisions that have had enormous impacts on young people’s educational opportunities and undermined attempts to tackle social justice. The Department must act urgently to address the damage that has been done.

60. For the now overdue spending review, the Department must make the case to the Treasury for a post-16 core funding rate raise from £4,000 to at least £4,760 per student, rising in line with inflation. This is needed to ensure pupil services can be provided at minimum acceptable levels, and prevent institutions from having to cut back still further on the breadth of subjects offered. The Department must additionally commit to revising this figure following a comprehensive bottom-up assessment of cost requirements as outlined in Chapter 7.

126 Education Committee, [Oral evidence: School funding reform](#), HC 154, 31 January 2017, Q94

127 Q479

128 Qq481, 493

129 Q354

5 Social justice and tackling disadvantage

Overview

61. The link between socio-economic background and attainment has remained strong in England compared to many other OECD countries, despite gradual progress over the past twenty years. Young people from disadvantaged backgrounds have continued to perform poorly in assessments compared to their more advantaged peers.¹³⁰ A full 43% of pupils eligible for free school meals (FSM) at age five did not reach a good level of development in 2018, compared to 26% of those not eligible.¹³¹ To support disadvantaged children and raise educational attainment, the Coalition Government introduced the Pupil Premium in 2011 as an additional funding source for state-funded schools in England. Under Pupil Premium, schools with students registered as being eligible for free school meals (FSM) within the past six years attract a £1,320 or £935 grant for primary and secondary school students respectively.¹³² A total of £2.4 billion was allocated in 2017–18 in respect of circa two million pupils.¹³³

62. The impact of Pupil Premium on tackling disadvantage was difficult to assess: whilst the gap continued to close after the premium was introduced, it did not do so at an accelerated rate. Overall, schools with larger Pupil Premium budgets and stronger accountability incentives had improved more than schools with different intakes. For disadvantaged pupils in persistent poverty (i.e. those eligible for FSM for at least 80% of their time in school), the disadvantage gap widened both before and after the introduction of the premium, however.¹³⁴ Natalie Perera, Executive Director of the Education Policy Institute, highlighted the difficulties in attributing direct causality given the range of influencing factors, and the possibility that the premium was preventing the disadvantage gap from widening further than it otherwise might have done.¹³⁵

Improving Pupil Premium

63. Our evidence indicated that, on the whole, the idea of the Pupil Premium enjoyed substantial support.¹³⁶ There were however a number of concerns that witnesses suggested needed to be addressed regarding the premium's use, how the mechanism operated, accountability systems, and the eligibility criteria.

130 Education Policy Institute, [Key drivers of the disadvantage gap](#), July 2018, p4

131 Social Mobility Commission, [State of the Nation 2018–19: Social Mobility in Great Britain](#), April 2019, p vii. Level of development refers to measures by the early years foundation stage profile assessment framework)

132 Figures for 2019–2020, available at Education & Skills Funding Agency, [Pupil premium: conditions of grant 2019 to 2020](#), 17 December 2018. The Government also provides £2,300 for looked-after children and £300 for children with parents who have served in the armed forces.

133 House of Commons Library, Briefing Paper, [The Pupil Premium](#), 17 April 2018, p3

134 Education Policy Institute ([FUN0064](#)) paras 11.9–11.10

135 Qq32–3

136 NAHT ([FUN0054](#)) paras 22–3; National Foundation for Educational Research (NFER) ([FUN0056](#)) para 11; School Financial Success ([FUN0057](#)) para 11; Staffordshire County Council ([FUN0062](#)) para 43; Sutton Trust and Education Endowment Foundation ([FUN0074](#)) para 10; County Councils Network ([FUN0076](#)) paras 28–9

Use of the Pupil Premium

64. There was widespread acknowledgement that Pupil Premium funding was being used to plug holes in school budgets, rather than being directed towards disadvantaged pupils.¹³⁷ The Sutton Trust and Education Endowment Foundation said a “small but significant” number of schools saw offsetting budget cuts elsewhere as the main priority for the Premium funding.¹³⁸ We were also made aware of problems within multi-academy trusts viewing Pupil Premium as a replacement for core funding.¹³⁹ Luke Sibieta said the situation was unsurprising, given that school funding would have been cut in real terms between 2010 and 2015 were it not for the Pupil Premium.¹⁴⁰ The Education Policy Institute observed that it was

surprising that the disadvantage gap continues to narrow at all—given the wider context of children’s services—and this presents a real risk that the Pupil Premium becomes a backstop against worsening attainment gaps for disadvantaged children rather than a driver for improvement.¹⁴¹

65. Additional concerns were raised about the effectiveness of Pupil Premium even when it was being used as intended. We heard that many schools had initially used the money for new teaching assistants, whereas recent evidence suggested that these resources could have been deployed differently to better maximise educational outcomes.¹⁴² Luke Sibieta highlighted the importance of using the premium for evidence-based initiatives to ensure interventions were targeted and transformative.¹⁴³ The Sutton Trust proposed introducing an incentive system under the National Funding Formula to reward schools demonstrating good use of Pupil Premium money and evidence-based best practice.¹⁴⁴ This could involve building on the Pupil Premium Awards scheme to ensure that schools consistently improving results whilst closing the attainment gap were more systematically recognised and rewarded.¹⁴⁵

Pupil Premium as a funding mechanism

66. Pupil Premium funding allocations have not been rolled into the National Funding Formula. We considered the case for these two mechanisms to be rolled into one on the grounds that the NFF already contained a disadvantage allowance,¹⁴⁶ or that the premium funding was vulnerable to Spending Review negotiations.¹⁴⁷ When we explored this

137 Essex County Council ([FUN0016](#)) para 10; Grammar School Heads’ Association ([FUN0020](#)) para 13; Ambitious about Autism ([FUN0025](#)) paras 11–12; Northamptonshire County Council ([FUN0042](#)) para 4.1; Mr John Eccleston ([FUN0047](#)) para 8; The Netherhall School and Sixth Form ([FUN0049](#)) para 4; Mr Paul Atkinson ([FUN0050](#)) para 8; Devon County Council ([FUN0051](#)) para 3.1; National Foundation for Educational Research (NFER) ([FUN0056](#)) para 15; Ark ([FUN0059](#)) para 5; North Yorkshire County Council ([FUN0061](#)) para 14; Education Policy Institute ([FUN0064](#)) para 11.13; Association of Directors of Children’s Services ([FUN0065](#)) para 17; National Education Union ([FUN0073](#)) para 40; Cambridgeshire County Council ([FUN0078](#)) para 4.1; Effervesce ([FUN0098](#)) para 4.1; WorthLess? ([FUN0100](#)) para 8

138 Sutton Trust and Education Endowment Foundation ([FUN0074](#)) paras 16–18

139 Q407

140 Q26

141 Education Policy Institute ([FUN0064](#)) para 11.13

142 Qq27, 54

143 Q28

144 Sutton Trust and Education Endowment Foundation ([FUN0074](#)) para 21

145 Sutton Trust and Education Endowment Foundation, [The Pupil Premium: Next steps](#), July 2015, p4

146 Hinchley Wood School ([FUN0032](#)) paras 5.1–5.4; f40 Group of Authorities ([FUN0040](#)) paras 5.3–5.4

147 National Governance Association ([FUN0079](#)) para 3.1

option in our oral evidence sessions, however, Julia Harnden of the Association of School and College Leaders warned that there was “a real risk if we were to support absorbing it that we would just see a net reduction in funding”.¹⁴⁸ Maintaining separate mechanisms would also ensure the Department could target deprived pupils using different measures, such as the Income Deprivation Affecting Children Index (IDACI), which might identify local deprivation that was not captured by the Pupil Premium.¹⁴⁹

67. The option of ring-fencing Pupil Premium drew similarly mixed reactions. Darren Northcott of the NASUWT union supported the idea, saying this would ensure premium money was spent on the purposes for which it was intended.¹⁵⁰ Valentine Mulholland of the National Association of Headteachers believed however that ring-fencing would be “really difficult” given the current funding pressures, and that there were already strategies and oversight mechanisms in place to guide decision-making.¹⁵¹ We also heard that not all disadvantaged pupils attracted the Pupil Premium; ring-fencing the budget might therefore prevent schools from using the premium funding to support initiatives supporting all disadvantaged children irrespective of whether they were claiming FSM.¹⁵²

Accountability

68. The accountability system was identified as a further area in need of improvement. Maintained schools have been required to publish details of their Pupil Premium spend and impact, and academies have been encouraged (though not required) to do likewise. Stephen Tierney said the current system was “a waste of people’s time” because the plans were not properly looked at, and accountability to Ofsted was undermined by the fact that inspectors were only able to offer a “cursory glance” during visits due to other priorities.¹⁵³ He suggested instead an outcome-orientated form of attainment measure for people from disadvantaged backgrounds that did not get lost in the wider performance tables.¹⁵⁴ Jules White of the WorthLess? campaign group cautioned against an overly simplistic accountability measure predicated entirely on attainment data, however, as this data could go up or down substantially due to different student cohorts rather than any changes to funding or interventions.¹⁵⁵

69. We raised our concerns over spending and accountability with the Ministers. The Minister for School Standards acknowledged issues around governance and said the Department had taken action to improve accountability within the system. We pressed him to clarify what action the Department was taking regarding inaccurate information published on school websites. He said any such examples should be brought to the Department’s attention “and we will take them up”.¹⁵⁶ When asked about how the Pupil Premium system could be reformed—for example by matching more closely allocation

148 Q217

149 Education Committee, [Oral evidence: School funding reform](#), 31 January 2017, HC 154, Q18

150 Q199

151 Q200

152 Q203

153 Q216

154 Q220

155 *Ibid.*

156 Q408

levels to the extent and duration of deprivation—the Minister agreed there was potential to change the distribution system, but noted that the fixed overall size of the £2.4 billion spend meant any adjustments would result in winners and losers.¹⁵⁷

70. It is clear that Pupil Premium is being used to plug holes in school budgets rather than being directed at disadvantaged children. This is concerning but sadly unsurprising, given the financial pressure schools are under. Schools should not have to choose between running their core operations and supporting disadvantaged pupils. Ring-fencing Pupil Premium spending, or subsuming it under the National Funding Formula, will not fix the underlying problem that there is simply not enough money in the system.

71. The Department should confirm that it does not intend to ring-fence the Pupil Premium or subsume it within the National Funding Formula. Additionally, the Department should investigate how the Pupil Premium distribution could be made fairer so that allocations match more closely the child’s level and duration of deprivation.

72. The Department should review and revise the Pupil Premium compliance system, and in particular Ofsted’s role and oversight, to improve accountability whilst allowing flexibility for local-level innovation—for example via a more detailed measure of the performance of children from disadvantaged backgrounds. The Department should set out its proposed timetable for doing so in response to this Report.

73. The Department should review options for an enhanced incentive system to systematically reward schools making good use of the Pupil Premium for evidence-based interventions that close the attainment gap whilst improving school results. The Department should set out the options and implementation plan in response to this Report.

Eligibility criteria

74. In order for students to attract the Pupil Premium funding, they need to have been registered for FSM. In 2013 the Department estimated around 160,000 children in England were not claiming FSM,¹⁵⁸ resulting in millions in lost pupil premium funding.¹⁵⁹ More recent estimates suggested as many as one in ten eligible pupils were not being registered.¹⁶⁰ We heard that the introduction of Universal Infant Free School Meals had further reduced the uptake of free school meals among eligible families, with consequent impacts on Pupil Premium allocations.¹⁶¹

75. The Rt Hon Frank Field MP, Chair of the Work and Pensions Committee, told us the Department needed to explore how local authorities could be empowered to maximise FSM take-up. He suggested that school application and universal credit forms could be amended to include National Insurance numbers and a tick-box system to improve the

157 Qq502–3

158 Department for Education, [Pupils not claiming Free School Meals – 2013](#), December 2013, p5

159 Rt Hon Frank Field MP ([FUN0001](#)) paras 5–6

160 Social Mobility Commission, [State of the Nation 2018–19](#), April 2019, p52

161 Great Harwood St Bartholomew’s Parish C of E Aided Primary School ([FUN0005](#)) para 12; Norfolk County Council ([FUN0043](#)) para 11; Association of Directors of Children’s Services ([FUN0065](#)) para 18

level of enrolment.¹⁶² The National Association of Head Teachers (NAHT) called on the Government to support automatic FSM registration¹⁶³ – a move the Department had previously resisted during the development of the universal credit package.¹⁶⁴

76. The intention behind Pupil Premium is laudable. However, the lack of take-up of free school meals means that too many deserving children are not receiving the support to which they are entitled. The Department must ensure that all eligible pupils attract Pupil Premium.

77. The Department should outline in response to this Report whether it supports the principle of automatic enrolment for free school meals to ensure all eligible pupils receive Pupil Premium. It should additionally confirm what actions would be needed to introduce automatic enrolment, what action it has taken to overcome data-sharing concerns, and what actions it will take to ensure all eligible students receive their Pupil Premium allocation.

78. In the meantime, the Department should publish detailed estimates of the amount of unclaimed Pupil Premium money, and the Treasury should pay this amount into a separate fund to be spent on disadvantaged students.

Post-16 disadvantage funding

79. The level of funding for disadvantaged students in further education (FE) drew further criticism. Three quarters of all young people between 16 and 19 attend sixth forms and colleges. We heard however that there was no equivalent of Pupil Premium after students turned 16, despite the requirement for young people to remain in education, employment or training until 18. There were instead two categories; one supporting the student directly and the other supporting the education provider to supply additional support, including SEND requirements. These pots were also not ring-fenced, enabling institutions to include them as part of their core budgets if needed.¹⁶⁵

162 Frank Field ([FUN0001](#)) para 7

163 NAHT ([FUN0054](#)) para 24c

164 The Guardian, [Universal credit could mean 50,000 more children get free school meals](#), 16 November 2017

165 Social Mobility Commission, [State of the Nation 2018–2019](#), April 2019, p72

Fig 6: Disadvantage funding mechanisms for 16–19 year olds

Direct student support schemes	
16-19 Bursary Scheme	Discretionary bursary fund – to purchase equipment and other goods in-kind for students (e.g. bus fare, safety equipment, etc.).
	Defined vulnerable groups – up to £1,200/year for specific categories of students with needs, such as care leavers, those in care, and those on disability benefits.
Care to Learn	Childcare support for those up to the age of 20.
Residential support	To assist those who want to take courses that are not available nearby, such as specialist courses that are only offered in certain locations. To fund residential programmes to meet statutory care requirements.
College level schemes	
Disadvantaged block funding	Block 1: for students from areas of multiple deprivation, based on Indices of Multiple Deprivation 2015.
	Block 2: to support students with higher needs, including learning disabilities, and is based on low prior achievement in English and maths.

Source: Social Mobility Commission¹⁶⁶

80. Despite Year 11 pupils receiving Pupil Premium being more likely to go to further education colleges than anywhere else, we were told there was no national system and few local systems for organising admissions and transfers.¹⁶⁷ Institutions receiving new intakes would therefore not know automatically which students were disadvantaged, meaning they could fall under the radar. We also heard that schools were able to use Pupil Premium to cross-subsidise their sixth-forms – an option not available to FE colleges.¹⁶⁸

81. The scarcity of evidence has hampered efforts to determine the impacts of 16–19 disadvantage funding.¹⁶⁹ Analysis by the Education Policy Institute found a positive correlation between the proportion of disadvantaged/high needs pupils and funding gains, indicating that institutions with challenging intakes were being protected from the greatest funding squeezes.¹⁷⁰ The report also drew attention to the narrowing of the curriculum and contact time, however, highlighting that disadvantaged students did not appear to be in providers where learning hours had been protected despite providers attracting funding increases.¹⁷¹ Concerningly, FE institutions did not appear to have adequate support and guidance to ensure Premium money was being spent on evidence-based interventions, meaning that efforts to close the attainment gap might not be benefiting from the latest research and advice.¹⁷²

82. The cost of transport was raised as a particular issue for disadvantaged pupils. The Conservative 2017 manifesto committed to introducing “significantly discounted bus and train travel for apprentices to ensure that no young person is deterred from an

166 Social Mobility Commission, [State of the Nation 2018–2019](#), April 2019, p72

167 Association of Colleges (FUN0026) para 11

168 Gateshead College (FUN0027) para 5.2

169 Education Policy Institute, [16–19 education funding: trends and implications](#), May 2019, p9

170 *Ibid.*, p28

171 *Ibid.*, p9

172 Social Mobility Commission, [State of the Nation 2018–2019](#), April 2019, p73

apprenticeship due to travel costs”.¹⁷³ We heard however that progress had been slow, and travel continued to pose a significant barrier and influenced the choice of college for one in ten students; local colleges would likely be favoured over national ones or institutes of technology in such cases.¹⁷⁴ Over 40% of respondents to an NUS survey of FE students and apprentices said they had little or no money to get to work placements.¹⁷⁵ Councillor Paul Carter, Chair of the County Councils Network, argued that more money was needed to ensure that students—particularly those in more rural areas—could travel to the most appropriate institution rather than the one that was simply nearest.¹⁷⁶ Dr Birkinshaw, representing the Association of Colleges, told us that colleges had to subsidise transport out of their core funding, and the bursary scheme funding was inadequate:

students are choosing between having money for buses or having money for food. Quite frequently we will have to subsidise food for students because they have spent their money on their bus fare.¹⁷⁷

83. We found substantial support for an extension of Pupil Premium funding beyond 16. Dr Birkinshaw said it was “extraordinary that the pupil premium stops at 16”, especially given the large proportion of disadvantaged students going into further education.¹⁷⁸ The Sutton Trust similarly called for the premium to be extended to ensure disadvantaged pupils were supported throughout their education.¹⁷⁹ We noted the work that had been conducted on similar areas, for example the Association of Colleges’ campaign to extend free school meals to disadvantaged 16–18 year-olds.¹⁸⁰

84. We highlighted the inadequacies of disadvantage post-16 funding to the Minister for Apprenticeships and Skills, and asked whether Pupil Premium could be extended beyond 16. She said there were disadvantage funding pots already available, and that she had considered an extension but was “not sure that that would be the best way”.¹⁸¹ We did not however receive a clear indication as to what she thought might be a better approach, given the deficiencies in the current system.

85. Following our evidence session with the Ministers, we received a letter on 1 May 2019 from the Minister for Apprenticeships and Skills. The letter outlined existing funding arrangements and summarised the findings of research commissioned on options for supporting apprenticeship transport. The letter said however that “going further in this area would involve complexities and additional costs to the tax payer. As a result, the focus of this work is on preparing proposals for consideration at the forthcoming spending review”.¹⁸²

86. We do not think Pupil Premium should stop at 16. We appreciate that there are some disadvantage funding pots available, but these are too small and spread too thinly. Disadvantaged 16–19 year olds are not less deserving of support than under-

173 The Conservative and Unionist Party Manifesto 2017, [Forward together: Our plan for a stronger Britain and a prosperous future](#), p53

174 Q128

175 Ibid.

176 Qq318–9

177 Q129

178 Q91

179 Sutton Trust and Education Endowment Foundation ([FUN0074](#)) para 22

180 Association of Colleges, [No free lunch?](#)

181 Qq410–3

182 Department for Education ([FUN0106](#))

16s. They should not be treated as a lesser priority. Nor is it clear why there continues to be such a lack of data sharing between schools and FE institutions, which has led to disadvantaged students falling through the gap.

87. The Department should introduce a 16–19 Pupil Premium scheme. The Department should additionally develop a data-sharing system to ensure FE institutions can identify disadvantaged students automatically.

88. We were disappointed at the lack of adequate support for transport to further education institutions and apprenticeship workplaces. It is deeply disappointing that a clear manifesto commitment has languished between two departments, with little discernible sense of urgency to address the problem.

89. The Department should provide in response to this Report an outline of its plans and timetable to improve transport support for 16–19 education.

6 Special educational needs and disabilities

90. Funding and support for children and young people with special educational needs (SEN) is provided by a variety of mechanisms, underpinned by statutory guidance in the SEND Code of Practice and the provisions of the Children and Families Act 2014.¹⁸³ As of January 2018 there were 1,276,215 pupils in England with SEN, accounting for 14.6% of the school population.¹⁸⁴ Teachers, parents, and students have become increasingly concerned about the level of SEN funding pressures and the impacts on children and young people.¹⁸⁵ Our examination of this topic was necessarily restricted, given the breadth of the subject. During a parallel inquiry into Special educational needs and disabilities (SEND) we looked in greater detail at the implementation of the 2014 SEND reforms and how the system could be improved.¹⁸⁶ For the purposes of this Report, we maintained our focus on issues most relevant to funding, the spending review, and the prospects for a long-term plan.

Background to SEND funding

91. The introduction of the Children and Families Act 2014 brought substantial reforms to the way in which children with SEN requirements were identified, assessed, and supported. Among the principal changes were the extension of statutory support provision up to the age of 25; the replacement of School Action/School Action Plus with a single category of 'SEN Support'; the replacement of statements of special education need with Education, Health and Care (EHC) plans; improved integration with health and social care provision; and a commitment to place families at the centre of the process.¹⁸⁷

92. In September 2017 the Department set out how, under the new high needs national funding formula, high needs funding would be provided to local authorities using a formula that took into account a range of factors. These factors included a basic per-pupil funding unit for students in specialist SEN institutions, and proxy measures (for example deprivation, school attainment, poor health, and population). To prevent radical budget changes, half of the block was based on planned local authority spending on high needs for 2017–18.¹⁸⁸

93. Changes to the rules surrounding the DSG blocks prevented local authorities from transferring money from the schools block to another block without the consent of the Schools Forum. Permission from the Secretary of State would be required for transfers exceeding 0.5% of the schools block. The Department said it would maintain the schools and high needs block of the Dedicated Schools Grant per pupil funding in real terms up

183 Department for Education and Department of Health and Social Care, [Special educational needs and disability code of practice: 0 to 25 years](#), January 2015, p12

184 Department for Education, [Special educational needs in England: January 2018](#), 26 July 2018, p1. Note that this figure provides a snapshot in time and may not reflect the dynamic and fluctuating nature of SEN identification.

185 For an overview of the key issues, see House of Commons Library, [Special Educational Needs: support in England](#), 7 May 2019. For a definition of special education needs and disabilities used in England, see GOV.UK, [SEND code of practice: 0 to 25 years](#), 11 June 2014. See also Schools Week, [Campaigners to march on Downing Street over SEND funding crisis](#), 30 May 2019

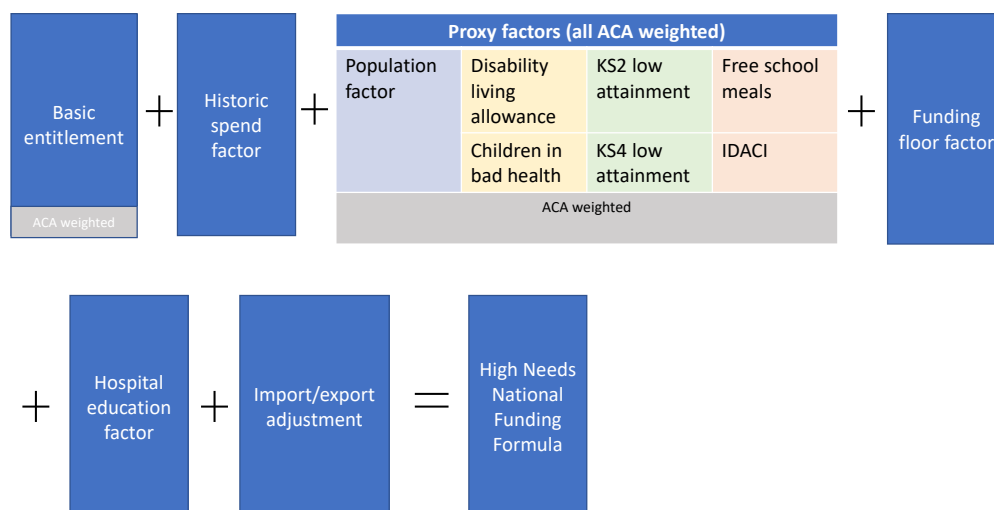
186 Education Committee, [Special educational needs and disabilities](#), HC 968, 18 April 2018

187 Children and Families Act 2014, [Background and Summary](#), Part 3

188 Department for Education, [The national funding formula for schools and high needs](#), September 2017, p33

to 2019–20,¹⁸⁹ with a further £350 million SEN allocation announced in December 2018.¹⁹⁰ The Department issued a consultation in May 2019 on the financial arrangements for the SEND and alternative provision (AP) system.¹⁹¹

Fig 7: The factors and calculations in the high needs national funding formula



Source: Education & Skills Funding Agency¹⁹²

High needs block funding

94. There have been deep concerns around long-term strategic planning and financial prudence regarding high needs funding. Witnesses from the education sector told us that the funding levels were unsustainable and had not kept pace with increasing demand.¹⁹³ Edward Timpson CBE, Chair of the Child Safeguarding Practice Review Board, told us that SEND funding and support measures needed to be a “real priority” in the spending review.¹⁹⁴ As Dave Hill, Executive Director of Children, Families and Learning at Surrey Council, noted, “demographic growth and the complexities of the SEND system [...] is where the real pressure is going to come [...] Unless we can address the issues about SEND funding, the whole system will implode at some point”.¹⁹⁵ The additional £350 million SEND allocation has been deemed inadequate and incapable of addressing wider systemic problems.¹⁹⁶ We heard that an effective response would need to consider the myriad inter-related reasons contributing to the funding pressures, including:

189 Department for Education, [The national funding formula for schools and high needs, Executive summary](#), September 2017, p5

190 Department for Education, [New funding to support children with special educational needs](#), 16 December 2018

191 Department for Education, [Funding for SEND and those who need AP: Call for evidence](#), 3 May 2019

192 Education & Skills Funding Agency, [High needs funding 2019 to 2020](#), June 2019, p21

193 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q44

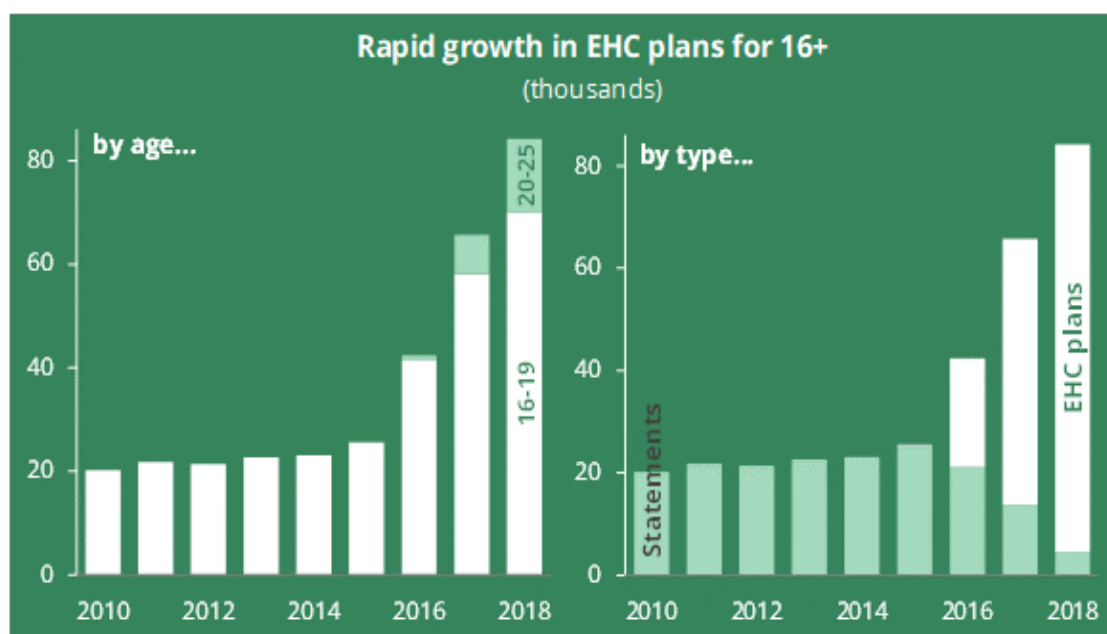
194 Education Committee, [Oral evidence: Accountability hearing](#), HC 341, 2 July 2019, Q2486

195 Q260

196 Schools Week, [Schools to get £350m extra SEND funding, but heads warn it's 'not enough'](#), 16 December 2018; National Education Union, [SEND provision](#), 15 April 2019; BBC, [Special needs: Petition demands action on 'national crisis'](#), 30 May 2019;

95. **Unexpectedly high demand:** The number of young people receiving statutory support between 2014 and 2018 rose by 35% between 2014 and 2018.¹⁹⁷ As of January 2018, 16–19 year-olds accounted for fully 70,100 of the 84,260 EHC plans in the 16–25 bracket, placing substantial pressure on the FE sector.¹⁹⁸

Fig 8: Growth in EHC plans



Source: House of Commons Library research briefing¹⁹⁹

96. Justin Cooke believed that the scale of the increase in EHC plans had exceeded initial expectations, and insufficient thought had gone into how the extension of support up to age 25 would be funded.²⁰⁰ Some local authorities said that the threshold for assessment had been lowered in the 2014 reforms, leading to increased workloads and resource pressures.²⁰¹ Additional drivers—such as increased diagnoses of certain conditions; medical advances that have enabled children born prematurely or with disabilities to live longer than previously; and population growth—also played a role.²⁰²

97. **Parental expectations:** Dame Christine Lenehan told our inquiry into Special educational needs and disabilities that the 2014 Act had set high expectations for parents, and codified their rights to services which the system had then been unable to deliver.²⁰³

98. **Vicious cycle:** The neglect of lower-level interventions under SEN support was singled out as a key underlying factor driving increasing system-wide costs. As Justin Cooke of Ambitious about Autism explained to our SEND inquiry, future requirements for more costly EHC plans could be reduced by ensuring children received appropriate care early on

197 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q46

198 House of Commons Library, [Post-16 Special Educational Needs FAQs](#), 17 May 2019, p3

199 House of Commons Library, [Post-16 Special Educational Needs FAQs](#), 17 May 2019

200 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q45

201 East Sussex County Council ([SCN0416](#)) para 1.6, Devon SEND Improvement Board ([SCN0428](#)) para 1.3

202 Education Policy Institute, [High Needs Funding: An overview of the key issues](#), p3

203 Education Committee, [Oral evidence: Special educational needs and disabilities \(roundtable\)](#), HC 968, 20 November 2018, Q149

under the SEN support system.²⁰⁴ Widespread perceptions and experiences of inadequate lower-level support in mainstream schools appeared however to be driving a crisis of confidence among parents, who were increasingly viewing EHC plans as a “golden ticket” to ensuring adequate support provision.²⁰⁵ Dr Jackie Lown, Head of Children and Young People at East Riding of Yorkshire Council, outlined the difficulties of this vicious circle: the increase in parental pressure to obtain an EHC plan was diverting resources away from SEN Support, thereby providing further impetus to obtain an ECH plan.²⁰⁶

99. Perverse incentives: The lack of incentives for inclusive practice was of further concern. Schools that had a good reputation for inclusivity were likely to attract higher rates of pupils with SEND. As the Parliamentary Under-Secretary of State for Children and Families Nadhim Zahawi acknowledged on 18 July 2018, inclusive schools often witnessed “perverse behaviours, where the other schools—whether by design or otherwise—just brush away those kids and push them towards that particular [inclusive] school”.²⁰⁷ Because of the requirement for schools to fund the first £6,000 of SEND provision out of their ‘notional budget’, those with a good reputation for inclusivity were facing disproportionately high costs. The lack of flexibility to transfer money to the high needs block was said to exacerbate this problem, as there were insufficient funds to proactively address the expenses incurred by more inclusive schools, or support interventions that might address the cycle of spiralling costs.²⁰⁸

100. Lack of inclusion leading to rising overall funding needs: According to Ofsted’s annual report for 2017–18, pupils with SEN support were five times likelier to receive a permanent exclusion than those with no SEND.²⁰⁹ The cost of exclusions to the taxpayer has been estimated at £370,000 per pupil (taking into account lifetime education, benefits, healthcare and criminal justice costs), or £2.1 billion for each year’s total cohort of excluded pupils.²¹⁰ The practice of informal exclusions and ‘off-rolling’²¹¹ has also received substantial attention, most recently in the Timpson Review which prompted Government pledges to tackle the issue.²¹² Justin Cooke highlighted that the current system provided schools with unfortunate financial incentives for off-rolling or permanent exclusions:

particularly when they get to the point of needing extra help that they do not get via an EHC plan or SEN support. They know those children will then be the local authority’s responsibility. If they are placed in a special school, it comes out of the high-needs block, whereas if they aided inclusion and kept them in the school, it would come out of their school block [...] If you have a school budget that is so tight you simply cannot pay teachers, there is an incentive to off-roll or exclude.²¹³

204 Education Committee, [Oral evidence: Special educational needs and disabilities](#), HC 968, 23 October 2018, Q74

205 See for example National Education Union, [SEND crisis: A teacher’s perspective](#), 23 August 2018; Schools Week, [Pupils on ‘SEN support’ fare worse than pupils with EHCPs](#), 20 November 2017

206 Education Committee, [Oral evidence: Special educational needs and disabilities](#), HC 968, 23 October 2018, Q99

207 Education Committee, [Oral evidence: Accountability hearings](#), HC 341, 18 July 2018, Q1370

208 Local Government Association, [Special educational needs and disabilities funding](#), 12 February 2019, p2

209 Ofsted, [The Annual Report of Her Majesty’s Chief Inspector of Education, Children’s Services and Skills 2017/18](#), HC 1707, December 2018, p51

210 Institute for Public Policy Research, [Making the difference](#), October 2017, p22

211 Defined by Ofsted as “The practice of removing a pupil from the school roll without a formal, permanent exclusion or by encouraging a parent to remove their child from the school roll, when the removal is primarily in the interests of the school rather than in the best interests of the pupil. Off-rolling in these circumstances is a form of ‘gaming’”. See Ofsted, [School inspection update: special edition](#), September 2018, p8

212 GOV.UK, [Edward Timpson publishes landmark exclusions review](#), 7 May 2019

213 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q46

101. The number of pupils with SEND going to more expensive specialised schools has also been increasing, resulting in an estimated additional cost to the high needs budget of around £200 million between 2014 and 2018.²¹⁴ The trend towards more specialised provision was reportedly driven by funding constraints, curriculum changes, and accountability pressures in mainstream schools that had reduced both the capacity and willingness to provide for children with SEND—a situation that simultaneously diminished parental confidence in the mainstream sector.²¹⁵

Impacts

102. The cumulative impacts of these various pressures have been severe. A report by ISOS Partnership estimated a national high needs spending deficit of between £1.2 billion and £1.6 billion by 2021. The report noted that even local authorities currently in a comparatively strong financial position spoke of ‘when’ not ‘if’ their high needs budget would go into deficit.²¹⁶ Local authorities have been accused of using the EHC assessment process to act as a ‘gatekeeper’ to accessing high needs block funding, and attempting to avoid granting approvals due to financial constraints.²¹⁷

103. The number of cases going to tribunal has been increasing, with an estimated £100 million spent by local authorities since 2014 on tribunal defence. On average, judgements were found in favour of families in 89% of cases.²¹⁸ We noted the importance of the tribunal system as a mechanism for accountability and redress, though we heard that improvements could be made. Dave Hill, Executive Director of Children, Families and Learning at Surrey County Council, described the tribunal process as “massive amounts of wasted energy” which “play[ed] into an adversarial scenario where parents are almost encouraged through the tribunal to fight the local authority”. He stressed the emotional, financial and impact benefits of developing a more positive relationship with families and sitting down to tackle issues collaboratively, rather than resorting to costly formal escalations.²¹⁹

104. Further education institutions have faced particular funding challenges. The Association of Colleges told our inquiry into Special educational needs and disabilities that a significant number of college students had a degree of SEND but had not received an EHC plan or support from the High Needs Funding block. Colleges therefore had to provide for them out of the Disadvantage Fund – a pot that was being spread across “several competing groups of students including the large number of students who require additional support in their compulsory retake of English and maths GCSE and the sharp increase of students with mental health difficulties”.²²⁰ In addition, colleges were not receiving any additional funding to cater for the increasing number of students coming from Alternative Provision, where these students would have been attracting between £10,000 and £18,000 in financial support.²²¹ Delayed payments from local authorities

214 ISOS Partnership, [Have we reached a ‘tipping point’? Trends in spending for children and young people with SEND in England](#), 2018, pp22–23

215 *Ibid.*, pp21–22

216 *Ibid.*, p5

217 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q51

218 Special Needs Jungle, [What costs £103.7 million and makes disabled children miserable?](#), 14 December 2018

219 Q272

220 Association of Colleges ([SCN0492](#)) para 18

221 *Ibid.*, para 19

and insufficient financial flexibility to deal with influxes of high needs students have put further strain on the system, leading to calls for a different funding system that provided longer-term financial certainty.²²²

105. Special educational needs and disability funding is completely inadequate. There is simply not enough money in the system to provide for the scale of demand. Local authorities are expected to face a funding shortfall in excess of £1 billion by 2021. The post-16 sector in particular is having to deal with significant challenges in the context of enormous funding constraints. This is not sustainable.

106. The Department must make the strongest possible case to the Treasury for sufficient funds to finance the widening high-needs deficit, projected to be over £1 billion by 2021, and address the underlying drivers of spiralling costs at an early stage. The funding uplift must include a thorough assessment of the cost implications of local authorities' duty to maintain an Education, Health and Care Plan up to the age of 25.

107. The Department's assessment of the core school funding uplift requirements must include a thorough analysis of the role that sufficient core school funding plays in facilitating early intervention and avoiding more costly interventions later on.

Tackling the problem

108. The tension between resource-led provision and needs-led provision has been a longstanding issue in the debate around SEND funding. We examined what changes would be needed to provide an appropriate level of support to children and young people given the reality of fiscal constraints. The evidence submitted to our inquiry was clear that periodic top-ups would not be enough to address the systemic drivers exacerbating the funding crisis. Rather, the accumulation of problems in the SEND funding system pointed towards the need for longer-term thinking and a co-ordinated effort to tackle the crisis of confidence, funding sufficiency, and operational delivery.

Early intervention and use of the notional budget

109. Better early intervention was consistently cited as one of the best ways to manage SEND requirements in an inclusive and cost-effective way. Evidence submitted to our inquiry into Special educational needs and disabilities indicated that schools felt unable—and were perhaps insufficiently willing—to provide a graduated response to additional needs before resorting to statutory support systems.²²³ This was said to foster a lack of inclusive practice within schools,²²⁴ and the diminishing faith among parents in SEN Support was associated with the increase in EHC plan requests.²²⁵

110. Addressing this would require improvements to the notional budget system. In theory, mainstream maintained schools would fund the first £6,000 of a pupil's SEN requirements out of the 'notional budget' – a proportion of the individual school's budget that had been earmarked to cover SEN-related support. Additional funding requirements beyond the £6,000 should come from the local authority's high needs block, subject to local authority

222 Ibid., paras 16–17

223 Staffordshire County Council ([SCN0458](#)) para 9; Cambridgeshire County Council ([SCN0537](#)) para 1.15

224 North Yorkshire County Council ([SCN0185](#)) para 3d; Northamptonshire County Council ([SCN0496](#)) para 3

225 Telford and Wrekin Council ([SCN0429](#)) para 2.2; Calderdale MBC ([SCN0491](#)) para 3.3; Essex County Council ([SCN0498](#)) para 1.5

approval. In practice, however, we heard that the notional budget was not always spent on its intended purposes or was overly-focused on fulfilling EHC plan requirements, largely due to wider funding pressures.²²⁶ At the same time, schools faced difficulties accessing top-up funding from local authorities.²²⁷

111. We heard that effective interventions could often be quite simple, particularly for children below the threshold of an EHC plan, but required an ethos of inclusion and appropriate teacher training. This could require clearer national expectations for mainstream schools on what they could and should be delivering.²²⁸ In terms of tracking the spending, Justin Cooke said it would be useful to know how many pupils the budget was expected to support, what interventions were being funded, and long-term outcomes for pupils.²²⁹ Additionally, the notional budget system could be made more forward looking to support schools' strategic planning for anticipated trends in the number and complexity of needs requirements. These changes would need to be linked to a review of incentives for inclusion, addressing in particular the perceived financial benefits of passing EHC plan or permanent exclusion costs onto the high needs block rather than engaging in quality preventative support.

112. We questioned the Ministers on potential improvements to the notional budget system and inclusive practices within schools. The Minister for School Standards did not endorse the idea of improved notional budget tracking, arguing that “the problem with that line of thinking is you can end up telling schools that they have to identify every element”.²³⁰ He noted the financial challenges faced by inclusive schools, stating that the Department was “looking very seriously at that element [...] It is an issue that we absolutely acknowledge”.²³¹ The Government's subsequent engagement on the Timpson recommendations around off-rolling and accountability indicated a positive first step in this area.²³²

Making funding more responsive

113. We also heard that the national funding formula needed to be more responsive to changes in high need.²³³ According to the Department's high needs funding formula guidance for the year 2018–19, local authorities received £5.8 billion per year to fund high needs. This was allocated on the basis of local authority spending patterns in 2012–13, which in turn was derived from local authority patterns and decisions in 2005–06. The guidance stated that the Department had

updated the distribution for 2017–18 to reflect 2016–17 spending levels, but this remains directly linked to spending levels rather than to any estimate of levels of need [...] We are committed to moving to a more rational basis

226 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Qq75–78, and [15 January 2019](#), Q274

227 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q58

228 ISOS Partnership, [Have we reached a 'tipping point'? Trends in spending for children and young people with SEND in England](#), 2018, pp31–32

229 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q77

230 Q401

231 Q394

232 GOV.UK, [Edward Timpson publishes landmark exclusions review](#), 7 May 2019

233 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Q55

for distributing funding for children and young people with high needs, taking into account an up-to date assessment of the level of need in each area.²³⁴

114. The Government’s response to its 2017 consultation on the high needs national funding formula noted concerns over the 50% weighting for the historical spend factor, and the lack of responsiveness to population growth. It nevertheless concluded that “setting this factor at 50% of local authorities’ current spending on high needs strikes the right balance”.²³⁵ Julie Cordiner told us however that the system remained insufficiently responsive: the weighting of the historical spend allocation acted as a “massive brake” on changing funding according to need; half of the 2017–18 local authority spend on high needs was locked into the high needs funding formula for the next four years; the population aspect of the formula did not capture fluctuations in special needs incidence; and the other weightings did not properly capture post-16 support needs.²³⁶

115. The Department should review and revise the high needs funding formula to ensure it is sufficiently responsive to changing needs. The factors and weightings in the formula should be amended to develop a more forward-looking approach that is less reliant on historical factors, and takes greater account of projected trends and requirements for financial flexibility. As part of this review, the Department should assess the extent to which notional budget allocations take sufficient account of future trends, and facilitate adjustments to the notional budget allocation methodology to make funding arrangements more forward-looking.

234 Department for Education, [The national funding formula for schools and high needs: Policy document](#), September 2017, p30

235 Department for Education, [Analysis of and response to the high needs national funding formula consultation](#), September 2017, paras 3.11–3.13

236 Education Committee, [Oral evidence: Special Educational Needs and Disabilities](#), HC 968, 23 October 2018, Qq55–56

7 Towards a solution - a ten year plan

Long-term strategy

116. Throughout our inquiry we consistently saw a need for the Department to take a more strategic, long term approach to school and college funding. This appeared to be driven in part by wider questions over the future of the school and college system itself. Over the past decade there have been commitments to a ‘self-improving school-led system’ to make schools more autonomous and accountable for their own improvement,²³⁷ only to be followed by an increased role for regional schools commissioners, tighter regulation, and increasing pressure to produce good outcomes or face being taken over by a MAT.²³⁸ The academisation process has also experienced difficulties; the National Audit Office recently raised questions over the feasibility of continuing to convert large numbers of schools to academies and called on the Department to ensure the school system was “coherent with all of its parts working effectively together”.²³⁹

117. When we explored the issue of long-term planning in our inquiry, there were concerns that ‘initiative-itis’ was standing in for long-term vision.²⁴⁰ Indeed, we were not always able to discern overarching strategic objectives or funding prioritisation behind the Department’s policy announcements, which have in recent months included offline activity passports encouraging outdoor pursuits; free learning apps; tackling plastic waste; academisation; reducing teacher workload; life-saving classes in all schools; and improving teacher productivity through better technology use.²⁴¹

118. Substantial sums have been announced for a range of initiatives – in January 2019 alone, there was £45 million for new social workers; £4.5 million for MFL ‘centres of excellence’; £1.3 million to support music; £130 million for the teacher recruitment and retention strategy; £2.5 million to support international exchanges for disadvantaged pupils; and the launch of a school energy price comparison website.²⁴² April 2019 saw the widely welcomed announcement for £940 million to protect the Teachers’ Pension Scheme, alongside a range of other initiatives including £84 million on the 30th anniversary of the Children Act for projects to support families; £6.5 million on early communication skills projects; and £10 million on the EdTech strategy.²⁴³ Whilst these initiatives were doubtless important and beneficial, we were concerned that this busy schedule masked a wider absence of engagement around what the 5–19 education sector could and should look like in future.

237 See Department for Education, [The Importance of Teaching: The Schools White Paper 2010](#), Cm 7980, November 2010

238 UCL Institute of Education, [Hierarchy, Markets and Networks: Analysing the ‘self-improving school-led system’ agenda in England and the implications for schools](#), 2018, pp11–12

239 National Audit Office, [Converting maintained schools to academies](#), HC 720, 22 February 2018, p13

240 Q246

241 The Telegraph, [Teachers should not spend evenings responding to emails from pushy parents](#), Education Secretary says, 23 January 2019; Schools Week, [Pupils should ditch gadgets and climb trees in 2019](#), Damian Hinds tells schools, 29 December 2018; Schools Week, [Damian Hinds challenges all schools to go single-use plastic free by 2022](#), 27 December 2018; GOV.UK, [Damian Hinds: Learning life-saving skills in school is crucial](#), 3 January 2019; Tes, [Damian Hinds: My year-long battle to reduce your workload](#), 10 January 2019; Tes, [Hinds calls for more schools to become academies](#), 23 January 2019; GOV.UK, [Education in the media: Making technology work for education](#), 3 April 2019

242 See GOV.UK, [News and communications, Department for Education](#), January 2019

243 GOV.UK, [News and communications, Department for Education](#), April 2019

119. Taking the NHS's recent Long Term Plan as an example of matching funding to long-term objectives,²⁴⁴ we examined the merits of a ten-year strategic plan for education funding. One of the primary benefits would be greater long-term consistency and a de-politicisation of education policy—a theme that has featured across a range of our inquiries.²⁴⁵ Terrence James O'Neill, Baron O'Neill of Gatley, said he would “plead for some kind of underlying imposition of long-term consistency [...] so that whoever comes in next just doesn't suddenly discover their own favourite things from a spad [and] trashes everything else that has been around”.²⁴⁶

120. Substantial long-term benefits in savings and efficiencies could also be achieved. To take but one example, Jules White highlighted the £1.3 billion spend on supply figures and £600 million on agency fees that could be reduced by addressing underlying problems in the system.²⁴⁷ A long-term plan would also help overcome silos and support the Department's case for funding allocations to reflect the balance of inter-dependencies and cross-departmental responsibility areas, for example taking into account the benefits of education keeping people in physical and mental health, or ensuring adequate pastoral provision which reduces the rate of costly exclusions.

121. Most importantly, the concept of a ten-year plan offered a good opportunity to move education funding towards a needs-based model. This would involve conducting a wide-ranging assessment of what the school and college curriculum should look like; what outcomes these institutions should be delivering; what additional responsibilities might arise from changing responsibilities around assessments or qualifications; what support and services schools and colleges should be providing given the wider public services context; and a realistic estimate of how much these all cost.²⁴⁸ Kevin Courtney of the National Education Union (NEU) believed the Department could learn useful lessons from the Gonski review in Australia on transforming the debate around the school system and needs-led funding in this regard.²⁴⁹

122. Aligning funding allocations with real-world delivery costs appeared to be a common sense approach. We were however not able to establish during our inquiry whether the Department had actually carried out such bottom-up assessments. Our evidence suggested that it had not,²⁵⁰ or if it had, it did not appear to be driving policy given the serious mismatch between requirements and current funding availability.²⁵¹

Costs

123. Initial indications suggested that an activity-based funding model would require multi-billion pound funding increases; modelling published by the Association of School and College Leaders found an estimated £5.7 billion shortfall for primary and secondary

244 See NHS England, [NHS Long Term Plan](#)

245 Education Committee, [Oral evidence: Education in the north](#), HC 819, 5 June 2019, Qq44–48; Education Committee, [Oral evidence: Special educational needs and disabilities \(roundtable\)](#), HC 968, 20 November 2018, Q151

246 Education Committee, [Oral evidence: Education in the north](#), HC 819, 5 June 2019, Q44

247 Q243

248 Qq153–6

249 Q152

250 Qq71, 152. See also National Audit Office, [Financial sustainability of schools](#), HC 850, 14 December 2016, p29 para 2.7

251 School Financial Success ([FUN0057](#)) para 10.3

schools in England for the year 2019–20.²⁵² The Institute for Fiscal Studies said £3.8 billion would be needed to fill the 8% funding gap, based on a 2019–20 schools funding budget of circa £44 billion, though this figure did not attempt to take into account more subjective assessments of what schools required.²⁵³ Unions cited a range of figures for funding requirements, from £5 billion (UNISON) to £8 billion (NEU), and 6% of GDP (NASUWT).²⁵⁴ Jules White believed schools needed £6 billion extra funding: £2.7 billion to reverse the real-terms cuts; £1.5 to £2 billion to support the high needs block; and £1.3 billion to better fund the implementation of the national funding formula to reduce gaps between the lower- and better-funded areas and address real-term costs.²⁵⁵

124. We noted the complexities involved in coming up with a reliable figure at present, given the lack of clarity around the Department’s long-term priorities, uncertainty around the level of services schools were expected to provide, and unclear or under-explored options for cross-departmental collaboration on policy and funding.²⁵⁶ A range of issues could be taken into account, for example:

- upfront cash injections to back-fill areas that had been subjected to funding pressures (for example capital budgets);
- future increases to specific areas (for example the age-weighted pupil unit, disadvantage funding, SEND support, FE base rates, and so forth);
- policy decisions on what level of services schools and colleges should be providing (in terms of subject breadth, pupil-to-teacher ratio, contact time, support services etc.), and the cost of doing so to a reasonable standard;
- accounting for likely funding pressures arising from future policy decisions (for example teacher pay awards);
- strategic assessments of the requirements for our future economy and society; and
- efficiencies gained through joint-working and cost-sharing across departments and local services.²⁵⁷

Funding model

125. The funding model for a ten-year plan could take several forms, for example continuing with the spending review process; pinning investment to a proportion of GDP (similar to NATO or overseas aid commitments); or agreeing a new multi-year funding settlement similar to the five-year funding settlement which preceded (but was dependent on) the NHS plan.

252 Association of School and College Leaders, [The True Cost of Education](#), March 2019

253 Institute for Fiscal Studies, [Extra spending on education in England – the numbers explained](#), 18 June 2019

254 Qq172, 175–6, 184

255 Q237

256 Qq153–5, 240–2

257 Qq71, 152

Spending review process

126. Some submissions argued the spending review process was a sufficient²⁵⁸ or indeed optimal approach, as it allowed for dynamic assessments of the overall fiscal forecasts and planning to ensure that cross-Government spending plans were affordable and joined up.²⁵⁹ Others noted that some departments seemed to manage the spending review process and longer term forecasting reasonably well, so the two should not be seen as mutually exclusive.²⁶⁰

127. Several submissions levelled substantial criticism at the current spending review system, however, arguing that its inherently political nature too often led to short-term considerations and inter-departmental competition taking priority over wider strategic goals.²⁶¹ Questions were also raised as to why the additional cost pressures did not appear to have been taken into account in the last spending review period.²⁶² A different approach would be needed to encourage collaborative assessments of where funding could be more joined up (for example across education, health, and communities and local government remits), and take a more long-term holistic view.²⁶³ As the Sixth Form Colleges Association put it:

all or nothing bids to Treasury every few years, punctuated by small, eye catching announcements in annual budgets, is no way to fund our colleges and schools.²⁶⁴

128. Stephen Tierney similarly believed that without a ten-year plan “you are going to end up with more initiative-itis and quick fixes, and that is the danger, because that creates a lot of fuss and fury and poor spending.”²⁶⁵ Written evidence submitted by School Financial Success agreed, arguing that the spending review cycle

does not match patterns of cost changes, meaning funding is not responsive to any new burdens. New policies are introduced mid-term such as the Apprenticeship Levy, pay awards are decided annually, and notification of changes in employer National Insurance and pension contributions are often too late for schools to plan for them. Some cohorts of pupils are therefore at an unfair disadvantage in terms of the resources available to them [...]

This is an expensive and wasteful system, where schools, colleges, [local authorities] and Trusts are pulled first one way then another, with pupils being the likely losers.²⁶⁶

129. The general school and college funding cycle also appeared to be in need of revision. We heard that schools were required to prepare budget forecasts over a three-year period, but the lack of certainty over funding—particularly towards the end of a spending review

258 Hinchley Wood School (Ben Bartlett) (FUN0032) para 4.1

259 Education Policy Institute (FUN0064) para 10.1

260 Association of Colleges (FUN0026) para 9

261 Sixth Form Colleges Association (FUN0041) para 33

262 Essex County Council (FUN0016) para 8

263 Sixth Form Colleges Association (FUN0041) para 33; Martin Matthews (FUN0017) para 5.1–2; NCFE (FUN0019) para 11; School Financial Success (FUN0057) para 10.1

264 Sixth Form Colleges Association (FUN0041) para 33

265 Q246

266 School Financial Success (FUN0057) para 10.2

period—undermined the utility of this exercise.²⁶⁷ Schools and local authorities said there was a delay of around eleven months in receiving funding for additional pupils who arrived during the course of the year—a situation which put further pressure on already strained budgets.²⁶⁸ We received several submissions calling for multi-year funding settlements to aid financial planning;²⁶⁹ schools generally advocated a 3–5 year period, while colleges called for a 5–7 year planning period.²⁷⁰

Percentage of GDP

130. We did not find substantial support for ringfencing a proportion of GDP. One submission argued that allocating a proportion of GDP might be attractive in a strong economy, but a downturn could result in ongoing funding decreases at a time when investing in skills and education would be most needed.²⁷¹

Funding settlement

131. A more promising approach would be to secure agreement from the Treasury to fund a ten-year plan, following the example of the NHS Long Term Plan.²⁷² This would have the benefit of enabling the Department to develop a properly-costed bottom-up assessment of the school and college education system requirements, and engage in detailed negotiations with the Treasury on securing a commensurate funding settlement.

132. Our evidence suggested this option would offer the best chance of rejuvenating England’s school and college system. Continuing with the business-as-usual model and securing a modest package under the spending review process would be unlikely to address the deep structural problems that would continue to drive spiralling costs and uneven outcomes. Securing a substantial increase within the spending review process that reversed the 8% funding gap would likely go a long way to addressing priority funding areas, such as further education and SEND, but again this would not be enough to tackle underlying drivers, or provide longer-term financial certainty, improved strategic thinking, and better cross-departmental working. A ten-year funding plan, by contrast, would provide a properly financed education system characterised by strategic investments rather than reactive adjustments, and ensure that children and young people received the high quality education and support they deserved.

267 Martin Matthews ([FUN0017](#)) para 5.4; Norfolk County Council ([FUN0043](#)) para 3; Devon County Council ([FUN0051](#)) para 2.2; School Financial Success ([FUN0057](#)) paras 3.1–2; National Governance Association ([FUN0079](#)) para 2.1; Mrs Sarah Chambers ([FUN0088](#)) para 1.2; Cumbria County Council ([FUN0089](#)) para 29

268 Essex County Council ([FUN0016](#)) para 5; Robert May’s School ([FUN0071](#)) para 4.9; Cambridgeshire County Council ([FUN0078](#)) para 5.1

269 Burton and South Derbyshire College ([FUN0044](#)) para 9; The Local Government Association ([FUN0055](#)) para 4.1; School Financial Success ([FUN0057](#)) para 12.2; Norfolk Governance Network ([FUN0072](#)) para 2a; Association of Colleges ([FUN0026](#)) para 8

270 Gateshead College ([FUN0027](#)) para 4.1; Derby College ([FUN0080](#)) para 2.4

271 Islington Council and Schools Forum ([FUN0022](#)) para 14

272 See NHS England, [Long Term Plan](#)

Government position

133. The Ministers seemed sympathetic to our proposal for a ten-year plan. The Minister for School Standards Nick Gibb was clear that there was “a case for having a longer-term strategic plan in education as they have in health”.²⁷³ When asked further about emulating the NHS in terms of securing funding, the Minister said the Department was

very serious about how we present our case to the Treasury. We are working extremely hard in all these areas: early years, schools, post-16, and high needs. We are presenting the best case possible in this spending review, as we did in the last two spending reviews, to make sure that first we are protected, but secondly that they address some of these very serious challenges.²⁷⁴

134. We questioned the Ministers on how this case to the Treasury was being prepared, and what figures they were requesting. The Minister for Apprenticeships and Skills told us that our inquiry did

not necessarily coincide with the moment at which the Department for Education wants to make that sort of information public. I could not tell you. I do not think either Nick or I are qualified to tell you. One has to be careful when you set out spending plans that you also have the right incentives in place. It is not just about the money. It is how you make sure it is spent to the benefit of people who need education.²⁷⁵

135. In response to questions about the level of cross-departmental collaboration in developing a case, the Minister for Apprenticeships and Skills acknowledged the scope for joint working to overcoming existing silos, and believed that “your idea of a five or 10-year plan, which is an entirely valid one, would have to suck in that”.²⁷⁶ When we pressed the Ministers for details on the potential timescales for developing a long-term plan, the Minister for Apprenticeships and Skills told us that within the Department

those sort of discussions are going on [...] and I think probably Nick and I would both agree with you that something like a five- or 10-year plan is exactly the sort of thing that I’m sure the Secretary of State will be thinking about.²⁷⁷

136. A ten-year plan for education funding is essential. It would provide schools, colleges and the Department with much needed strategic direction and financial certainty. The short-termism and initiative-itis that characterises the Department’s current approach cannot afford to continue. We are pleased that Ministers recognise the value of our proposal.

137. The Department needs to take political short-termism out of school and college funding by developing an ambitious ten-year plan. We suggest the funding model should involve a multi-billion pound settlement from Treasury, informed by a bottom-

273 Q338

274 Q356

275 Q347

276 Q357

277 Q339

up assessment of the cost of delivering a quality education for all children and young people. The Department should confirm in response to this Report its intentions and timeline for doing so.

138. The Department needs to be transparent about how much money is needed for the education system. It must conduct and publish a comprehensive, bottom-up assessment of what services and support schools and colleges are having to provide, the real-world costs of delivering these activities and meeting attainment expectations, and how these costs relate to current school and college funding provision. The outcome of this assessment must inform the funding package for the ten-year plan.

Conclusions and recommendations

Funding pressures

1. We are pleased that the Department is beginning to acknowledge the significant financial strain that schools and colleges are under. There is simply not enough core funding, and the capital funding landscape is becoming increasingly concerning. The Department's recognition of this problem now needs to be translated into significant funding increases. (Paragraph 18)
2. *The Department must make the strongest possible case to the Treasury for a multi-billion pound funding increase in the next spending review, and ensure this is aligned with the requirements for a ten-year plan as set out in Chapter 7 of this Report.* (Paragraph 19)
3. We heard disturbing reports that the Department was spending millions on 'school resource management advisers' whose cost-saving suggestions included keeping money raised at charity events, cutting children's food portions, and using spare staff to cover three simultaneous classes in a school dining hall. The Minister said these recommendations had been taken "out of context". We call on the Department to release the full reports to us, to show the context in which the recommendations were made. (Paragraph 20)
4. *In response to this Report, the Department should provide us with the full documents described by Schools Week, a breakdown by category of the measures suggested by school resource management advisers across the country, how much the resource advisers cost, and an evaluation of the long-term value for money provided by their cost-saving recommendations.* (Paragraph 21)
5. Publicly available data on school funding is extremely varied and subject to different calculations from a variety of sources. We are concerned this confusion can be exploited to portray a misleading picture. Having a single, reliable resource provided via an easily accessible official statistics publication would help resolve ongoing disputes over funding levels and how they are calculated. We are confident that the Department would welcome the additional transparency and public confidence that such a resource would bring. (Paragraph 25)
6. *The Department should develop an official statistics publication for school and college funding.* (Paragraph 26)

Core school funding

7. We fully support the intentions behind the National Funding Formula (NFF), and it is clear to us that maintaining a degree of local flexibility is important. We are nevertheless concerned that the so-called 'soft' formula continues to be based on local historical rates that perpetuate the anomalies it was supposed to remove. These historical factors hamper the NFF's potential to act as a truly redistributive tool. (Paragraph 36)

8. *The Department should bring forward legislative proposals to implement a 'hard' National Funding Formula for schools as soon as a parliamentary majority is available. We encourage the Department to investigate how best to address outliers whose individual circumstances might not be accurately captured by even the best-designed funding formula. (Paragraph 37)*
9. Schools require an urgent funding increase. The age-weighted pupil unit (AWPU) funding in the NFF is set too low. (Paragraph 38)
10. *The Department must raise the AWPU for the next spending review period. The Department must also commit to revising the AWPU again following a comprehensive review of the real-world costs of school education, as recommended in Chapter 7. (Paragraph 39)*
11. The Department must ensure that multi-academy trusts (MATs) are properly held to account over their internal operations, the way they fund themselves, and how they distribute funding to schools within their trust. We are not convinced that the current framework is adequate. *The Department should confirm in response to this Report whether, under a hard funding formula, MATs would continue to maintain discretion over allocating funds to schools within their trusts. If they would, the Department must explain how it intends to ensure this system does not undermine the NFF's core aim of providing equitable and consistent funding across schools. (Paragraph 45)*
12. *Ofsted should be granted the powers and resources to conduct inspections at MAT level. The Department should also require MATs to publish detailed, accessible data on their website showing how they fund themselves, where this money comes from, and a breakdown of what it is spent on. These publications should be combined with performance indicators to support oversight by authorities and parents. (Paragraph 46)*

Post-16 education funding

13. Post-16 education has been cut to the core. We note the Minister's position about post-financial crash difficulties. Other sectors have however moved on. The continued underfunding of this pivotal stage in education is longer justifiable. These budget pressures are the result of political decisions that have had enormous impacts on young people's educational opportunities and undermined attempts to tackle social justice. The Department must act urgently to address the damage that has been done. (Paragraph 59)
14. *For the now overdue spending review, the Department must make the case to the Treasury for a post-16 core funding rate raise from £4,000 to at least £4,760 per student, rising in line with inflation. This is needed to ensure pupil services can be provided at minimum acceptable levels, and prevent institutions from having to cut back still further on the breadth of subjects offered. The Department must additionally commit to revising this figure following a comprehensive bottom-up assessment of cost requirements as outlined in Chapter 7. (Paragraph 60)*

Social justice and tackling disadvantage

15. It is clear that Pupil Premium is being used to plug holes in school budgets rather than being directed at disadvantaged children. This is concerning but sadly unsurprising, given the financial pressure schools are under. Schools should not have to choose between running their core operations and supporting disadvantaged pupils. Ring-fencing Pupil Premium spending, or subsuming it under the National Funding Formula, will not fix the underlying problem that there is simply not enough money in the system. (Paragraph 70)
16. *The Department should confirm that it does not intend to ring-fence the Pupil Premium or subsume it within the National Funding Formula. Additionally, the Department should investigate how the Pupil Premium distribution could be made fairer so that allocations match more closely the child's level and duration of deprivation.* (Paragraph 71)
17. *The Department should review and revise the Pupil Premium compliance system, and in particular Ofsted's role and oversight, to improve accountability whilst allowing flexibility for local-level innovation—for example via a more detailed measure of the performance of children from disadvantaged backgrounds. The Department should set out its proposed timetable for doing so in response to this Report.* (Paragraph 72)
18. *The Department should review options for an enhanced incentive system to systematically reward schools making good use of the Pupil Premium for evidence-based interventions that close the attainment gap whilst improving school results. The Department should set out the options and implementation plan in response to this Report.* (Paragraph 73)
19. The intention behind Pupil Premium is laudable. However, the lack of take-up of free school meals means that too many deserving children are not receiving the support to which they are entitled. The Department must ensure that all eligible pupils attract Pupil Premium. (Paragraph 76)
20. *The Department should outline in response to this Report whether it supports the principle of automatic enrolment for free school meals to ensure all eligible pupils receive Pupil Premium. It should additionally confirm what actions would be needed to introduce automatic enrolment, what action it has taken to overcome data-sharing concerns, and what actions it will take to ensure all eligible students receive their Pupil Premium allocation.* (Paragraph 77)
21. *In the meantime, the Department should publish detailed estimates of the amount of unclaimed Pupil Premium money, and the Treasury should pay this amount into a separate fund to be spent on disadvantaged students.* (Paragraph 78)
22. *We do not think Pupil Premium should stop at 16. We appreciate that there are some disadvantage funding pots available, but these are too small and spread too thinly. Disadvantaged 16–19 year olds are not less deserving of support than under-16s. They should not be treated as a lesser priority. Nor is it clear why there continues to be such a lack of data sharing between schools and FE institutions, which has led to disadvantaged students falling through the gap.* (Paragraph 86)

23. The Department should introduce a 16–19 Pupil Premium scheme. The Department should additionally develop a data-sharing system to ensure FE institutions can identify disadvantaged students automatically. (Paragraph 87)
24. We were disappointed at the lack of adequate support for transport to further education institutions and apprenticeship workplaces. It is deeply disappointing that a clear manifesto commitment has languished between two departments, with little discernible sense of urgency to address the problem. (Paragraph 88)
25. *The Department should provide in response to this Report an outline of its plans and timetable to improve transport support for 16–19 education.* (Paragraph 89)

Special educational needs and disabilities

26. Special educational needs and disability funding is completely inadequate. There is simply not enough money in the system to provide for the scale of demand. Local authorities are expected to face a funding shortfall in excess of £1 billion by 2021. The post–16 sector in particular is having to deal with significant challenges in the context of enormous funding constraints. This is not sustainable. (Paragraph 105)
27. *The Department must make the strongest possible case to the Treasury for sufficient funds to finance the widening high-needs deficit, projected to be over £1 billion by 2021, and address the underlying drivers of spiralling costs at an early stage. The funding uplift must include a thorough assessment of the cost implications of local authorities' duty to maintain an Education, Health and Care Plan up to the age of 25.* (Paragraph 106)
28. *The Department's assessment of the core school funding uplift requirements must include a thorough analysis of the role that sufficient core school funding plays in facilitating early intervention and avoiding more costly interventions later on.* (Paragraph 107)
29. *The Department should review and revise the high needs funding formula to ensure it is sufficiently responsive to changing needs. The factors and weightings in the formula should be amended to develop a more forward-looking approach that is less reliant on historical factors, and takes greater account of projected trends and requirements for financial flexibility. As part of this review, the Department should assess the extent to which notional budget allocations take sufficient account of future trends, and facilitate adjustments to the notional budget allocation methodology to make funding arrangements more forward-looking.* (Paragraph 115)

Towards a solution – a ten year plan

30. A ten-year plan for education funding is essential. It would provide schools, colleges and the Department with much needed strategic direction and financial certainty. The short-termism and initiative-itis that characterises the Department's current approach cannot afford to continue. We are pleased that Ministers recognise the value of our proposal. (Paragraph 136)

31. *The Department needs to take political short-termism out of school and college funding by developing an ambitious ten-year plan. We suggest the funding model should involve a multi-billion pound settlement from Treasury, informed by a bottom-up assessment of the cost of delivering a quality education for all children and young people. The Department should confirm in response to this Report its intentions and timeline for doing so. (Paragraph 137)*
32. *The Department needs to be transparent about how much money is needed for the education system. It must conduct and publish a comprehensive, bottom-up assessment of what services and support schools and colleges are having to provide, the real-world costs of delivering these activities and meeting attainment expectations, and how these costs relate to current school and college funding provision. The outcome of this assessment must inform the funding package for the ten-year plan. (Paragraph 138)*

Formal minutes

Tuesday 16 July 2019

Members present

Robert Halfon, in the Chair

Lucy Allan Emma Hardy

Ben Bradley Ian Mearns

Marion Fellows Mr William Wragg

Draft Report (*A ten-year plan for school and college funding*) proposed by the Chair, brought up and read.

Ordered, That the Chair's draft Report be read a second time, paragraph by paragraph.

Paragraphs 1 to 138 read and agreed to.

Summary agreed to.

Resolved, That the Report be the Tenth Report of the Committee to the House.

Ordered, That the Chair make the Report to the House.

Ordered, That embargoed copies of the Report be made available (Standing Order No. 134).

[Adjourned till 23 July 2019 at 9.30 am

Witnesses

The following witnesses gave evidence. Transcripts can be viewed on the [inquiry publications page](#) of the Committee's website.

Tuesday 19 June 2018

Natalie Perera, Executive Director, Education Policy Institute, **Luke Sibieta**, Research Fellow, Institute for Fiscal Studies, **Angela Donkin**, Chief Social Scientist, National Foundation for Educational Research [Q1–80](#)

Wednesday 10 October 2018

Dr Alison Birkinshaw, former President, Association of Colleges, **Emily Chapman**, Vice President (Further Education), National Union of Students, **James Kewin**, Deputy Chief Executive, Sixth Form Colleges Association [Q81–143](#)

Tuesday 6 November 2018

Darren Northcott, National Official, Education, NASUWT, **Kevin Courtney**, Joint General Secretary, National Education Union, **Jon Richards**, National Secretary Education, Local Government, Police and Justice, UNISON, **Valentine Mulholland**, Head of Policy, National Association of Headteachers [Q144–205](#)

Stephen Tierney, Headteachers' Roundtable, **Julia Harnden**, Funding Specialist, Association of School and College Leaders, **Jules White**, Founder, Worthless? [Q206–247](#)

Tuesday 27 November 2018

Dave Hill, Executive Director of Children, Families and Learning, Surrey County Council, **Gary Fielding**, Corporate Director of Strategic Resources, North Yorkshire County Council, **Tim Moss**, County Commissioner for School Quality Assurance and Intervention, Staffordshire County Council [Q248–292](#)

Cllr Anntoinette Bramble, Chair of the Children and Young People's Board, Local Government Association, **Cllr Paul Carter**, Chair, County Councils Network, **Yolande Burgess**, Strategy Director, London Councils [Q293–328](#)

Wednesday 3 April 2019

Rt Hon Anne Milton MP, Minister of State for Apprenticeships and Skills, **Rt Hon Nick Gibb MP**, Minister of State for School Standards [Q329–510](#)

Published written evidence

The following written evidence was received and can be viewed on the [inquiry publications page](#) of the Committee's website.

FUN numbers are generated by the evidence processing system and so may not be complete.

- 1 Alliance for Inclusive Education ([FUN0102](#))
- 2 Alne Primary School Governing Body ([FUN0024](#))
- 3 Ambitious about Autism ([FUN0025](#))
- 4 Ark ([FUN0059](#))
- 5 Association of Colleges ([FUN0026](#))
- 6 Association of Directors of Children's Services ([FUN0065](#))
- 7 Atkinson, Mr Paul ([FUN0050](#))
- 8 Basse, Professor Michael ([FUN0007](#))
- 9 Bath & North East Somerset Branch of the NAHT ([FUN0003](#))
- 10 Brent National Education Union ([FUN0014](#))
- 11 Bristol City Council ([FUN0028](#))
- 12 British Educational Suppliers Association ([FUN0038](#))
- 13 Burton and South Derbyshire College ([FUN0044](#))
- 14 Cambridgeshire County Council ([FUN0078](#))
- 15 Cambridgeshire Schools Forum ([FUN0037](#))
- 16 Campaign for State Education ([FUN0015](#))
- 17 Catholic Education Service ([FUN0070](#))
- 18 Chambers, Mrs Sarah ([FUN0088](#))
- 19 Chesham Primary School ([FUN0009](#))
- 20 Colley, Mr Brett ([FUN0036](#))
- 21 County Councils Network ([FUN0076](#))
- 22 Cumbria County Council ([FUN0089](#))
- 23 Department for Education ([FUN0099](#))
- 24 Department for Education ([FUN0105](#))
- 25 Department for Education ([FUN0106](#))
- 26 Department for Education ([FUN0108](#))
- 27 Derby College ([FUN0080](#))
- 28 Devon County Council ([FUN0051](#))
- 29 Early Education ([FUN0021](#))
- 30 Eccleston, Mr John ([FUN0047](#))
- 31 Education Policy Institute ([FUN0064](#))
- 32 Effervesce ([FUN0098](#))
- 33 Essex County Council ([FUN0016](#))

- 34 f40 Group of Authorities ([FUN0040](#))
- 35 Fair Funding for All Schools ([FUN0030](#))
- 36 Fen Drayton Primary School ([FUN0029](#))
- 37 Field MP, Rt Hon Frank ([FUN0001](#))
- 38 Gateshead College ([FUN0027](#))
- 39 Grammar School Heads' Association ([FUN0020](#))
- 40 Great Harwood St Bartholomew's Parish C of E Aided Primary School ([FUN0005](#))
- 41 Hampshire County Council ([FUN0060](#))
- 42 Hill, Mrs Lisa ([FUN0084](#))
- 43 Hinchley Wood School ([FUN0032](#))
- 44 Hoylandswaine Primary School ([FUN0033](#))
- 45 Institute for Fiscal Studies ([FUN0082](#))
- 46 IPSEA ([FUN0053](#))
- 47 Islington Council and Schools Forum ([FUN0022](#))
- 48 Jisc ([FUN0096](#))
- 49 Lindridge St Lawrence CE Primary ([FUN0091](#))
- 50 Local Government Association ([FUN0055](#))
- 51 London Councils ([FUN0094](#))
- 52 Manningtree High School ([FUN0018](#))
- 53 Matthews, Martin ([FUN0017](#))
- 54 Milton Keynes College ([FUN0077](#))
- 55 Morris Education Trust ([FUN0087](#))
- 56 NAHT ([FUN0054](#))
- 57 National Deaf Children's Society ([FUN0066](#))
- 58 National Education Union ([FUN0073](#))
- 59 National Foundation for Educational Research ([FUN0056](#))
- 60 National Governance Association ([FUN0079](#))
- 61 National Union of Students ([FUN0058](#))
- 62 NCFE ([FUN0019](#))
- 63 The Netherhall School and Sixth Form ([FUN0049](#))
- 64 Norfolk County Council ([FUN0043](#))
- 65 Norfolk Governance Network ([FUN0072](#))
- 66 North Yorkshire County Council ([FUN0061](#))
- 67 Northamptonshire County Council ([FUN0042](#))
- 68 The Publishers Association ([FUN0075](#))
- 69 Rawlins Academy ([FUN0011](#))
- 70 Robert May's School ([FUN0071](#))
- 71 Save Our Schools, Brighton and Hove ([FUN0090](#))

- 72 School Financial Success ([FUN0057](#))
- 73 School of Education, University of Birmingham ([FUN0083](#))
- 74 Sixth Form Colleges Association ([FUN0041](#))
- 75 Sport and Recreation Alliance ([FUN0101](#))
- 76 SSCYP ([FUN0069](#))
- 77 St Laurence School ([FUN0039](#))
- 78 St Nicholas CE Primary School ([FUN0004](#))
- 79 Staffordshire County Council ([FUN0062](#))
- 80 Surrey County Council ([FUN0085](#))
- 81 Sutton Trust and Education Endowment Foundation ([FUN0074](#))
- 82 Thomas Pocklington Trust and RNIB ([FUN0095](#))
- 83 UNISON ([FUN0081](#))
- 84 University of the Arts London ([FUN0086](#))
- 85 Warrington Borough Council ([FUN0097](#))
- 86 WEA ([FUN0067](#))
- 87 William Martin C.of. E Infant and Junior Schools ([FUN0103](#))
- 88 Woodhouse West Primary School ([FUN0035](#))
- 89 WorthLess? ([FUN0100](#))

List of Reports from the Committee during the current Parliament

All publications from the Committee are available on the [publications page](#) of the Committee's website. The reference number of the Government's response to each Report is printed in brackets after the HC printing number.

Session 2017–19

First Report	Fostering	HC 340 (Cm 9662)
Second Report	The future of the Social Mobility Commission	HC 866 (Cm 9619)
Third Report	The Government's Green Paper on mental health: failing a generation: First Joint Report of the Education and Health and Social Care Committees of Session 2017–19	HC 642 (Cm9627)
Fourth Report	Appointment of the Chair of the Social Mobility Commission	HC 1048
Fifth Report	Forgotten children: alternative provision and the scandal of ever increasing exclusions	HC 342 (Cm9709)
Sixth Report	The apprenticeships ladder of opportunity: quality not quantity	HC 344 (HC 1814)
Seventh Report	Value for money in higher education	HC 343 (CP 1)
Eighth Report	Nursing degree apprenticeships: in poor health?	HC 1017 (HC 2007)
Ninth Report	Tackling disadvantage in the early years	HC 1006 (CP 68)
First Special Report	Children and young people's mental health—the role of education: Government Response to the First Joint Report of the Education and Health Committees of Session 2016–17	HC 451
Second Special Report	Apprenticeships: Government Response to the Second Joint Report of Session 2016–17	HC 450
Third Special Report	Multi-academy trusts: Government Response to the Committee's Seventh Report of Session 2016–17	HC 452
Fourth Special Report	Exiting the EU: challenges and opportunities for higher education: Government Response to the Committee's Ninth Report of Session 2016–17	HC 502
Fifth Special Report	Primary assessment: Government Response to the Committee's Eleventh Report of Session 2016–17	HC 501
Sixth Special Report	Evidence check: Grammar schools: Government Response to the Committee's Fourth Report of Session 2016–17	HC 623
Seventh Special Report	The apprenticeships ladder of opportunity: quality not quantity: Government Response to the Committee's Sixth Report of Session 2017–19	HC 1814

Eighth Special Report Nursing degree apprenticeships: in poor health?:
Government response to the Committee's Eighth
Report of Session 2017–19 HC 2007