

What's cooking? A review of evidence and discussion on the Free School Meals (FSM) measure in the National Pupil Database

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Contents

Executive summary	5
FSM: the past two decades	6
Strengths, weaknesses, and possible uses of the FSM measure in representing disadvantage and prioritising pupils	7
Further research	9
Introduction	10
‘No such thing as a free lunch?’: key findings	10
The current report	13
Section one: History of free school meals, eligibility criteria, and linked entitlements	15
Long-run history	15
Criteria for FSM eligibility over the past two decades	16
General trend in changes to entitlements for FSM-eligible social security benefits over the past two decades	25
Large-scale expansions of free school meals to pupil groups	27
The wider context of FSM eligibility: What else does FSM status confer?	28
Section two: How are children recorded as FSM-eligible, and how has this changed over time?	33
What is the official policy on the application process for FSM?	33
What are the roles of government, schools, local authorities and parents?	33
Different routes to identification as FSM-eligible	36
What has changed over time that may have systematically impacted the processes and patterns of children being recorded as FSM-eligible?	39
In summary: Sections one and two	42
Section three: Uses of FSM and Pupil Premium in practice and policymaking – intended and unintended consequences, and broader issues	44
FSM and Pupil premium as a tool for targeting pupils within schools	44
FSM status as a tool for monitoring school performance and the performance of the education system and policies	45

FSM as a proxy for ‘working class,’ and other socio-economic categorisations	46
FSM and Pupil Premium as key topline public measures for spending and funding ‘prioritisation’	49
Summary	56
Section four: Previous research and discussion on FSM’s validity and reliability	57
Research and discussion on the associations between FSM and income-level, low income, and/or poverty	58
Research and discussion on the associations between FSM and other socio-economic indicators and family background characteristics	60
Research and discussion on the associations between FSM and area-level measures	62
Relationships between FSM at the individual and the aggregate level	64
Research and discussion on the predictive power of FSM	67
Trajectories of FSM	71
Summary	73
Section five: possibilities and next steps	75
‘Gaps’	75
Alternatives to FSM for measuring ‘gaps’	78
Alternatives to ‘gaps’ – distributional measures	82
Funding structures and Pupil Premium	83
Summary	83
References	84
Annex	100

Executive summary

This report is part of a wider project, funded by the Nuffield Foundation: ‘What has “Free School Meals” measured, and what are the implications?’¹ The project is motivated by a mission, shared by many within educational research and social policy, to be able to examine accurately the experiences of different groups of children within the education system: particularly those from disadvantaged and/or marginalised groups. It is also motivated by a desire to make the best possible use, for knowledge-building and social good, of existing administrative information within the National Pupil Database (NPD), a census of all pupils in state education in England.

The aims of the project are as follows:

- To map in detail and critically explore which pupils have been represented by the FSM measure in the NPD (and by derived measures including Pupil Premium).
- To examine how this has varied according to other factors (including time, place, age/stage, cohort).
- To explore how FSM-attribution relates to children’s trajectories, experiences, and outcomes.
- To explore the implications of the above for different usages of FSM across research and policymaking, at different levels, and for different groups (pupil, school, area, national).
- To explore what alternatives/complementary measures may be useful or desirable, and their feasibility.

In this first paper, we briefly summarise findings from a previous publication that planted seeds for the project. Then we review, synthesise and discuss existing evidence on the evolution of the FSM measure, over the past two decades, and on its uses, including in Pupil Premium (PP). We explore the strengths and weaknesses of FSM and PP as measures for identifying disadvantaged pupils in research and policymaking, and we lay out next steps.

This paper is exploratory, introductory, and does not yet make recommendations. We hope it will add to debate and discussion whilst providing the necessary context and grounding for the overall project. We will draw conclusions and make recommendations in the final stage of this research.

¹ ‘Research: Projects.’ <https://www.nuffieldfoundation.org/project/what-has-free-school-meals-measured>

FSM: the past two decades

In sections one and two, we lay out the factors – at the high-level macro, down to the individual family and child-level – that have impacted which children are recorded as FSM and non-FSM in the NPD.

Families are entitled to apply for FSM for their child based on their receipt of certain welfare benefits, and low-income.² However, as well as individual-level family income poverty, registration of children as FSM depends on numerous aspects of the context and time in which they live. They include:

- Global economic and societal conditions that impact families' work and income (such as the financial crisis in 2008, and the Covid pandemic 2020 onwards).
- Welfare benefits regimes and policies under successive governments (because receipt of benefits determines entitlement for FSM).
- Incentives to sign up for and be registered as FSM-eligible (such as additional national entitlements and local provisions, based on FSM status – including holiday clubs and food programmes, and grants for expenses like school uniform).
- Disincentives to signing up for FSM (at the social level – for example, stigma – and the practical level – for example, lessened reason when free school meals become universal).
- The methods through which schools, local authorities, and governments promote and enable families to register their children as FSM-eligible.

This means that the composition of the group denoted FSM in the NPD varies and depends to some extent on the time and place in which a child lives. Sections one and two highlight family-level characteristics that may have become more or less prevalent within the FSM-recorded group over time, such as the incidence of lone-parent families (as benefits eligibility was changed for lone parents). The extent and types of disadvantages experienced by children recorded as FSM-eligible have differed over the years, in line with the changing contextual conditions and requirements for entitlement. This will be explored further in subsequent strands of the research project.

The evidence that we review in these first sections also indicates that, over time, the procedures for identifying children as 'Free School Meal-eligible' have increasingly dissociated from practices and decisions in terms of providing actual Free School Meals. Furthermore, children registered for FSM receive very different support and interventions depending on the area in which they live.

² <https://www.gov.uk/apply-free-school-meals>

Strengths, weaknesses, and possible uses of the FSM measure in representing disadvantage and prioritising pupils

The evidence we review in sections three, four, and five suggests a number of strengths and weaknesses of FSM as a measure, and nuances in the ways that it can be used more or less robustly in research and policymaking. Key to note here is that the discussion on FSM's adequacy for its various uses often relies on an implicit tolerance for error. We hope to explore further the extent to which error can be tolerated and made explicit, depending on the use to which FSM is being put, during the rest of this project.

Strengths

- The FSM measure is easily and consistently available within the NPD and requires no additional burden on schools for collection.
- The FSM measure requires no additional disclosure of personal information from families to schools.
- The FSM measure has been widely used and therefore has currency in conveying messages about how children who are more disadvantaged are faring under different educational and wider social policy regimes.
- There is a body of research into the FSM measure and ways and which it can be used, which can be utilised in understanding, interpreting, and improving research and policymaking involving FSM.

Weaknesses

- The binary FSM measure:
 - obscures substantial variation and heterogeneity within the groups denoted FSM and non-FSM;
 - and fails to convey the gradient of incremental (dis)advantage seen across many other measures of pupil/family background.
- Using the FSM measure to make predictions and set expectations for individual pupils results in inaccurate information for some, because it averages over large differences within the FSM-registered group (and within the non-FSM-registered group). This can result in misallocation, bias, and stereotyping.
- FSM is often assumed to be an individual-level measure, but, in fact, propensity to be registered as FSM-eligible depends to some extent on structural, compositional, and cultural factors at the group and local level – lending a lack of clarity to what FSM means and represents.
 - For example, registration for FSM among entitled families is higher in areas which are more deprived, and within some ethnic groups compared to others.

- Pupil Premium funding based on recorded FSM eligibility has fallen over a period where child poverty has risen – so FSM-registration does not adequately reflect levels of need based on its current criteria for eligibility.
- Some teachers report that FSM does not identify the most disadvantaged pupils within their school, so it targets ineffectively, and misallocates support and funding.
- This is congruent with quantitative studies of survey data, which suggest an imperfect overlap of FSM with key predictors of educational success and advantage within life, including:
 - Mothers' education
 - Measures of socio-economic status/'working class'
 - Family income-level, particularly gradients and the distribution at the higher end
 - Welfare benefits receipt
 - Instability/mobility in housing and other family circumstances
 - Parental employment
 - Some extremely disadvantaged pupils are therefore excluded from prioritisation based on the FSM measure.

Possible uses

FSM eligibility is recorded termly in the NPD for children present in state-funded education. Combining data from multiple time points over pupils' trajectories can improve and add nuance to interpretations in work using the measure, particularly when different combinations are compared and/or used alongside one another. Combinations may include:

- Considering children ever recorded FSM over the course of their school career, either as a distinct group, or compared to those 'never FSM,' or to the average.
- Using a linear variable denoting 'number of terms/years FSM' rather than a binary variable and looking across the spectrum.
- Using FSM alongside other measures of family circumstances, and triangulating understandings and interpretations with other data, from surveys and administrative sources, to generate a picture of how less resourced and advantaged families and pupils are faring.
- Interpreting the experiences of pupils denoted FSM through a wider lens, incorporating understandings of factors outside of education, such as poverty, in causing outcomes and experiences within education.

Further research

Building on the evidence review and synthesis here, the next steps of this project are as follows.

- Qualitative research with local authorities and schools.
 - To understand more about how children come to be registered as FSM-eligible, how processes and practices vary across area and over time, and the implications of this for families with different characteristics in terms of whether FSM-entitled children become registered as FSM eligible.
- Quantitative analyses of linked administrative and survey datasets.
 - To examine how the compositions of the FSM/non-FSM-recorded groups in the NPD have changed over the past two decades, and how they vary by place, and other family characteristics.
 - To explore further how well FSM has picked up aspects of family/child disadvantage and how this has varied.
 - To explore children's experiences and outcomes associated with being recorded as FSM-eligible.
- Deliberative discussion and synthesis.
 - To pull together the existing evidence, new evidence from the project, gather researchers within the field, and users of the FSM measure (and related data).
 - To discuss the implications of the evidence and collaborate to devise solutions/strategies for a more informed approach when using FSM in research and policy.
 - To make recommendations.

Introduction

The National Pupil Database contains de-identified pupil-level information, stretching from 2002 onwards. It is available for analyses by accredited researchers (mainly within the ONS's Secure Research Service).³ Pupils' recorded eligibility for Free School Meals (FSM) within the NPD has been a key variable of interest since this individual-level data became accessible. It has been used extensively, within and outside of government, in research, policymaking, resource allocation, monitoring, and accountability frameworks.

This paper sets a foundation for the rest of our two-year project, examining FSM as a measure, uses, and alternatives. It updates and adds to an earlier examination and critical consideration of the literature on FSM, and its uses: 'No such thing as a free lunch? Exploring the consistency, validity, and uses of the "Free School Meals" (FSM) measure in the National Pupil Database' (Campbell and Obolenskya, 2021). This was undertaken at the Centre for Analysis of Social Exclusion, LSE.⁴

Key findings from 'No such thing as a free lunch?' are summarised below. References and sources from the original paper are reproduced in Appendix A. After this summary, we outline the topics to be covered in subsequent sections of the current report.

'No such thing as a free lunch?': key findings

The previous literature review highlighted a number of consistently evidenced and longstanding issues with FSM as a measure, including:

- Under-recording in the NPD of FSM-entitled children (because not all children who meet the entitlement criteria for FSM receipt are in fact registered as eligible, and are therefore recorded as 'non-FSM').
- Variation by place (local authority and school) in levels of this non/under-recording of FSM-entitled children.
- That there have been changes over time and place to the practices and processes through which children are registered/identified as FSM-eligible.
 - That this potentially accounts for some of the variation and flux in those picked up by the measure.
- Variation over time in the composition of the group of children who are FSM-eligible/recorded as FSM, due to factors including:
 - changes in the criteria for eligibility.
 - macroeconomic and policy shifts pushing families in and out of eligibility.
 - policies such as universal free school meals reducing incentives/rationale for sign-up.
- That FSM only captures snapshots of circumstances, and cannot sufficiently proxy precariousness, security, or instability of family finances.

³ 'Apply for Department for Education (DfE) personal data.' <https://www.gov.uk/guidance/apply-for-department-for-education-dfe-personal-data>

⁴ Campbell, T. and Obolenskya, P. (2021) 'No such thing as a free lunch? Exploring the consistency, validity, and uses of the 'Free School Meals' (FSM) measure in the National Pupil Database.' <https://sticerd.lse.ac.uk/CASE/NEW/PUBLICATIONS/abstract/?index=8641>

- Fuzziness and variation in understandings of which children are represented by the FSM measure, and that a corresponding lack of clarity can be found in some research and policymaking based on the measure.

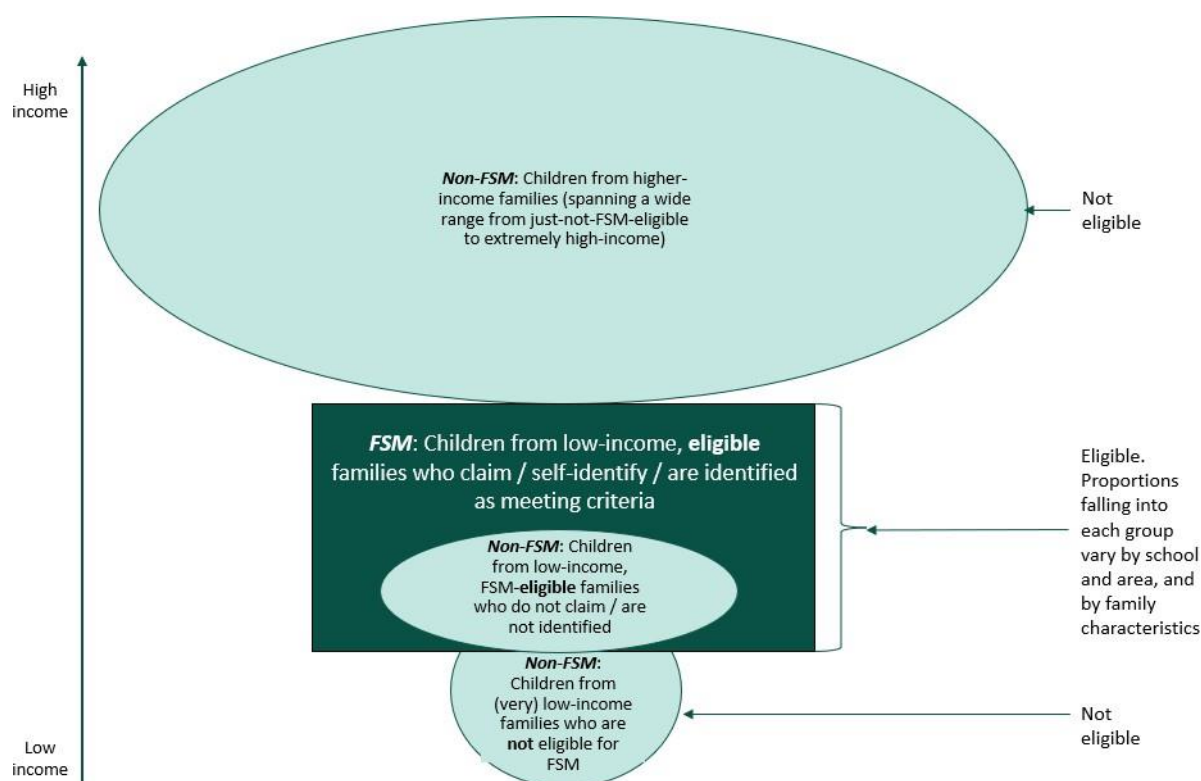
One key concern raised by this evidence, and detailed by Campbell and Obolenskya (2021), is that, for series of ‘comparisons of FSM vs non-FSM-denoted children to be directly and naively interpretable, FSM must represent a consistent set of children at each...point.’ Given evidence for variability and inconsistency, differences or ‘changes in outcomes and experiences for the FSM vs non-FSM groups may be an artefact of the changes to the identification and composition of the groups.’ This has implications for the accuracy of policymaking and research premised on an assumed stability and consistency among the FSM and non-FSM groups, and begs further exploration.

Another key concern is illustrated by Figure 1, reproduced from Campbell and Obolenskya, 2021. It summarises the evidence on FSM’s relationship to family income level, as well as incorporating some of the issues listed above.

Assessing the relationship between FSM and income level is arguably a particular priority in evaluating the veracity and validity of FSM, for at least two reasons. Firstly, the criteria for children's FSM eligibility is intended to ensure that those from families with the lowest incomes are flagged as such and receive free meals (more detail on this in Section one, below). Secondly, low income and poverty are causally related to children’s experiences, life chances, and outcomes.⁵ Therefore this is a dimension to which attention should be paid when evaluating how the education system and the wider social and policy environments are serving pupils and families. Many researchers and policymakers are concerned with the experiences of children from poor families. However, as Figure 1 conveys, the FSM measure is an imperfect proxy for these children.

⁵ Cooper, K. and Stewart, K. (2017). ‘Does Money Affect Children’s Outcomes? An update.’ <https://sticerd.lse.ac.uk/dps/case/cp/casepaper203.pdf>

Figure 1: What current evidence suggests about the relationship between family income-level and which children are attributed FSM v non-FSM in the National Pupil Database (Not to scale)



Source: Campbell and Obolenskya, 2021, p17⁶

Figure 1 represents evidence that:

- The eligibility criteria for FSM do not apply to all families with the lowest incomes.
 - Therefore there are some children from families with very low incomes who are recorded as non-FSM.
 - This includes some who may be conceived as extremely deprived, including ‘hidden’ populations such as ‘irregular migrant’ children, and, until recently, families with No Recourse to Public Funds in deep, long-term poverty; and others not accessing the welfare benefits that qualify FSM eligibility.
- The non-FSM group is extremely diverse, and children categorised as such come from families whose income falls below, within, and far above the range for FSM-recorded children.
 - Even focussing only on non-FSM children whose family incomes are higher than FSM-recorded children, there is an enormous gradient and diversity, far greater than that within the FSM group: from families on very low-incomes just missing eligibility, to extremely high earners.

⁶ Campbell, T. and Obolenskya, P. (2021) ‘No such thing as a free lunch? Exploring the consistency, validity, and uses of the ‘Free School Meals’ (FSM) measure in the National Pupil Database.’ <https://sticerd.lse.ac.uk/CASE/NEW/PUBLICATIONS/abstract/?index=8641>

Campbell and Obolenskya (2021) highlighted that ‘FSM status does not provide a clean, binary threshold divide between low-income and higher-income children; nor does it separate at a clear, conceptually logical point children who can be conceived of as falling along a continuum of ‘disadvantage.’ This previous review and initial new empirical analyses indicated that, ‘the groups of children identified as FSM and non-FSM are not equivalent over the years, for different cohorts. The FSM vs non-FSM delineation is not static, though it is sometimes treated as a static construct in statistical reporting and research and policymaking.’

The work in 2021 also emphasised where knowledge on the FSM measure is sparse or lacking: that ‘Whether and how...aspects of identification and under-identification vary across years and cohorts...is as yet unknown...differences in patterns of (under-)identification in different local areas is also yet fully to be explored, along with more detailed investigation of how changes to the type of areas in which FSM-recorded children are identified and ascribed intersect with [demographic] factors.’

Campbell and Obolenskya (2021) suggested that, ‘further scrutiny of who exactly is captured at different points in time by the FSM measure is important,’ alongside the ways in which FSM ‘attribution and tendencies of attribution at the family, school, and local level intertwine to form the realities of children’s educational experiences and outcomes.’ Lastly, the paper highlighted Halse and Ledger's conclusion back in 2007 that, ‘The success or failure of policy interventions to reduce the socio-economic status attainment gap needs to be evaluated on more than just FSM status.’⁷

The overriding purpose of the current project is, therefore, to address these unknowns and fill evidence gaps regarding FSM as a measure, and its uses. It is also to discuss and consider the strengths and weaknesses of alternative metrics and measures which may serve or complement the various purposes for which FSM is used.

The current report

Accordingly, this first report expands upon the previous evidence review. It provides further exploration of the history, construction, validity, and uses of FSM, and the identification of children as FSM-eligible. It sets the context for research, analyses, and deliberations to be explored over the course of the rest of the project. It also begins to introduce and consider ideas and issues around different measures which may be used to identify and prioritise pupils, and to monitor the ways the education system (and wider society and policies) impact different groups. The review will be updated as the project progresses, and feed into final considerations and publications on the strengths and weaknesses of FSM, strategies for its use, and alternatives.

The report contains five further sections. The first explores the history of free school meals, eligibility criteria, and linked entitlements. The second examines processes through which children are recorded as FSM-eligible in the NPD, and how this has changed over time. The uses of the FSM and derived Pupil Premium measures in practice and policymaking, and intended and unintended consequences of uses are discussed in section three. Section four details previous research on FSM’s

⁷ Halse, J. and Ledger, A. (2007) ‘The use of free school meal status as a proxy for socioeconomic status: Evidence from matching the Longitudinal Study of Young People in England to the National Pupil Database.’ https://nces.ed.gov/FCSM/pdf/2007FCSM_Halse.VI-C.pdf

reliability and validity. Lastly, section five begins to discuss possibilities for uses of FSM and alternative measures of disadvantage.

Section one: History of free school meals, eligibility criteria, and linked entitlements

The purpose of this section is to set the scene and provide grounding on the context through which children end up recorded as FSM/non-FSM-eligible in the NPD: the circumstances from which the FSM/non-FSM measure arises. We describe briefly the history of free school meals, investigate changes in entitlement criteria over time, and relationships between FSM entitlement and qualifying social security benefits. We note other entitlements (in addition to meals), and variations in entitlements, that recorded FSM eligibility confers.

Long-run history

Free school meals (FSM) have a long history. In the 19th Century, a significant proportion of school children were under-nourished due to poverty. Non-statutory organisations in local areas such as Manchester and Bradford, and charities such as the Salvation Army, began to provide free meals for school children.⁸ In terms of national policy and intervention by the state, however, it was not until the turn of the 20th century that, motivated by concerns about the physical health of children, it became possible for local authorities (LAs) to provide free school meals within the 1906 Education (Provision of Meals) Act.⁹ The meals were aimed at children who were most in need and suffered from malnutrition. However, their provision by LAs was optional, funding for them had to be raised through local taxation, and there was an expenditure limit set by central government.¹⁰ In practice, most authorities did not provide free meals at this point.¹¹

With the passing of the 1944 Education Act it became mandatory for LAs to provide free and nutritious school meals and milk, in primary and secondary schools, to address the government's concern about malnutrition following the Second World War and ongoing rationing.¹² The Act also set out eligibility criteria for FSM. It included five main measures for all local authorities to implement. A memorandum submitted by the Local Authorities Caterers' Association to a parliamentary select committee details requirements:

' 1. All pupils attending a state school were entitled to a school meal at lunchtime on every school day throughout each year.

2. The meals were to be free to those pupils whose parents/carers were:

- (a) unemployed; and
- (b) on low incomes.

⁸ Gilard, D. (2003) 'Food for Thought: child nutrition, the school dinner and the food industry.'
<https://education-uk.org/articles/22food.html>

⁹ 'A brief history of school meals' <https://bhfood.org.uk/a-brief-history-of-school-meals/>

¹⁰ Passmore, S. and Harris, G. (2004) 'Education, health and school meals: a review of policy changes in England and Wales over the last century.' <https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1467-3010.2004.00430.x>

¹¹ 'School Meals Act 1906' <https://intriguing-history.com/school-meals-act/>

¹² 'Select Committee on Education and Employment: Minutes of Evidence.'
<https://publications.parliament.uk/pa/cm199900/cmselect/cmduemp/96/9111002.htm#:~:text=In%201944%20the%20provision%20of,poor%2C%20with%20continuing%20food%20rationing.>

3. Other pupils' parents/carers were to pay. The price was set by government and was the same across the country.

4. The school meal was to provide a third of the daily nutritional requirements as laid down by the Department of Health.

5. Each Local Authority was to make returns to the Ministry of Education on the quantities of ingredients used.’¹³

Eligibility was later tightened with the 1986 Social Security Act, which restricted entitlement to FSM to children whose family was on Income Support, and withdrew free school meals for children whose parents/carers received family credit. This resulted in more than half a million children losing their access to free school meals.¹⁴

Criteria for FSM eligibility over the past two decades

In the wider project of which this paper is part, we focus on the 21st century: the years during which individual-level pupil data on recorded FSM eligibility is available to researchers and policymakers. Focusing on this more recent period, Figure 2 shows the percent of children in state-funded education recorded as FSM-eligible over the years, and Table 1 compares eligibility criteria across three time points: 2001/2; 2011/12 and 2021/22.

The early 20th century

From 2001 children were entitled to FSM if their family received Income Support or income-based Job Seeker's Allowance, or fell under part VI of the Immigration and Asylum Act 1999.¹⁵

In 2003 a number of changes were made to the eligibility criteria. Firstly, Child Tax Credit, without additional Working Tax Credit, was added, where incomes met a certain threshold. This additional criterion was added to protect children from missing out on FSM following changes to the tax credit system. The guaranteed element of State Pension Credit was also added to the criteria.

¹³ 'Select Committee on Education and Employment: Minutes of Evidence.'

<https://publications.parliament.uk/pa/cm199900/cmselect/cmeduemp/96/9111002.htm#:~:text=In%201944%20the%20provision%20of,poor%2C%20with%20continuing%20food%20rationing.>

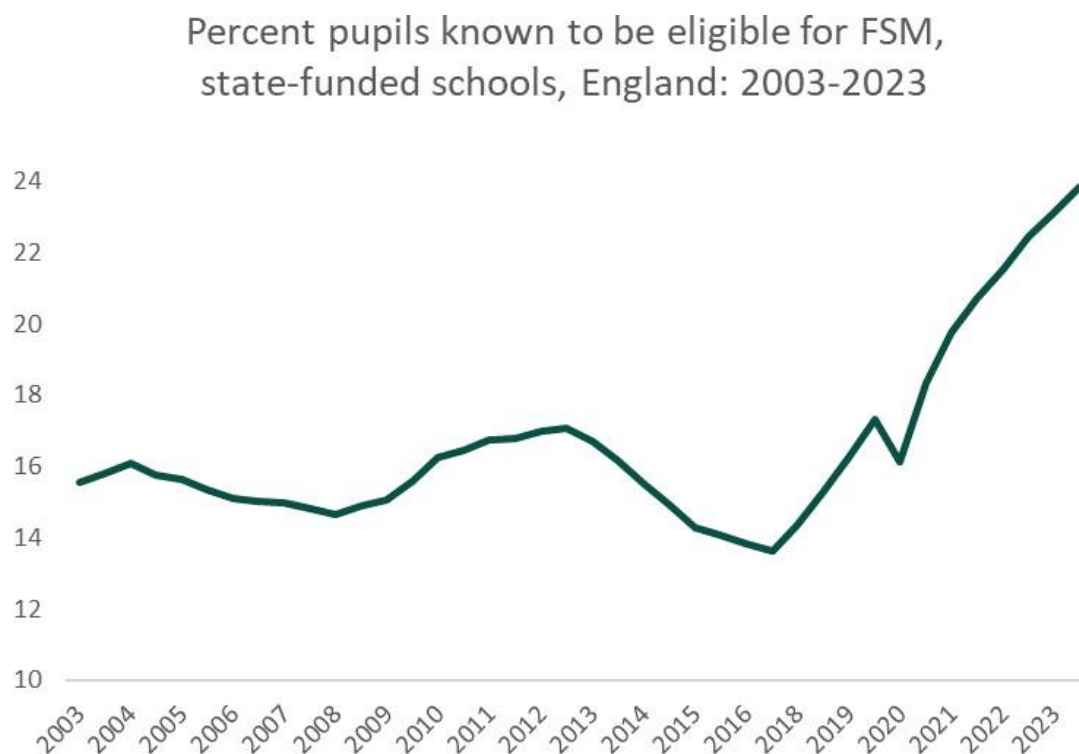
¹⁴ Select Committee on Education and Employment: Appendices to the Minutes of Evidence

<https://publications.parliament.uk/pa/cm199900/cmselect/cmeduemp/96/96ap17.htm>

¹⁵ Hansard (2007) 'Free School Meals Volume 460: debated on Wednesday 9 May 2007.'

<https://hansard.parliament.uk/commons/2007-05-09/debates/0705109000024/FreeSchoolMeals>

Figure 2: Percentage pupils in state-funded schooling recorded as FSM-eligible, over the past two decades



Source: Reproduced from Francis-Devine et al, 2023 (p26)¹⁶

There were further conditions introduced in 2003.¹⁷ First, a claim now had to be made in order to receive FSM. This is still the case today: 'A pupil is only eligible to receive a free school meal when a claim for the meal has been made on their behalf and their eligibility, or protected status, has been verified by the school where they are enrolled or by the local authority'.¹⁸ This move may have reduced the number of children receiving FSM / recorded as FSM-eligible in the early noughties: as described in the introduction, evidence indicates there are families who are entitled, but do not apply.

Secondly, children who were attending education settings but were not yet at the age for compulsory education had, and continue to this day, to attend both before and after lunch in order to be entitled to FSM.¹⁹ This impacted eligibility for FSM in maintained nurseries. It is potentially

¹⁶ Francis-Devine, B. et al (2023) 'Food poverty: Households, food banks and free school meals.'

<https://researchbriefings.files.parliament.uk/documents/CBP-9209/CBP-9209.pdf>

¹⁷ Hansard (2007) 'Free School Meals Volume 460: debated on Wednesday 9 May 2007.'

<https://hansard.parliament.uk/commons/2007-05-09/debates/0705109000024/FreeSchoolMeals>

¹⁸ Department for Education (2023) 'Free school meals Guidance for local authorities, maintained schools, academies and free schools.'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1133262/Free_school_meals.pdf

¹⁹ Hansard (2007) 'Free School Meals Volume 460: debated on Wednesday 9 May 2007.'

<https://hansard.parliament.uk/commons/2007-05-09/debates/0705109000024/FreeSchoolMeals>

restrictive, particularly for low-income families who may miss out if their child is not able to attend for the full day. Some early years settings limit how many government subsidised hours children can access in one day.²⁰

Table 1: Changes in criteria for FSM eligibility since 2001/2: qualifying benefits at each point

2001/2	2011/12	2021/22
Income support	Income support	Income support
Income-based jobseeker's allowance	Income-based jobseeker's allowance	Income-based jobseeker's allowance
Support under Part VI of the Immigration and Asylum Act 1999	Support under Part VI of the Immigration and Asylum Act 1999	Support under Part VI of the Immigration and Asylum Act 1999
	Child Tax Credit without Working Tax Credit (where income is below £13,230)	Child Tax Credit without Working Tax Credit (where income is below £16,190)
	Guarantee element of State Pension Credit	Guarantee element of State Pension Credit
	Income-related Employment and Support Allowance (ESA)	Income-related Employment and Support Allowance (ESA)
	Working Tax Credit run-on - paid for 4 weeks after you stop qualifying for Working Tax Credit	Working Tax Credit run-on - paid for 4 weeks after you stop qualifying for Working Tax Credit
		Universal Credit - if you apply on or after 1 April 2018 your household income must be less than £7,400 a year (after tax and not including any benefits you get)
		No recourse to public funds (providing meet income threshold)

In 2003, when this full-day condition was introduced, universal free hours for preschool attendance were limited to 12.5 per week - and still today, hours for low-income, non-working families are capped on the basis of receiving 15 per week in term-time: meaning that some children may not ever attend full days or over the lunch period.²¹

²⁰ Department for Education (2018) 'Early years entitlements: operational guidance.' https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1027881/Early_years_entitlements-operational_guidance_3_.pdf

²¹ Blanden, J. et al (2016) 'Universal Pre-school Education: The Case of Public Funding with Private Provision.' <https://onlinelibrary.wiley.com/doi/full/10.1111/ecoj.12374>
Gov.uk '15 hours free childcare for 3 and 4-year-olds.' <https://www.gov.uk/help-with-childcare-costs/free-childcare-and-education-for-2-to-4-year-olds>

This is reflected in the low percent of children attending state-maintained sector nurseries recorded as FSM-eligible: around 8% in 2021, compared to around 19% of children in state maintained Reception classes in the same year.²² Given that families with the youngest children have the highest chances of poverty, this indicates FSM is not in any way fully inclusive or representative of such children in the early years.²³

By 2011/12 income-related Employment and Support Allowance (ESA) had also been added to the eligibility criteria for FSM, along with Working Tax Credit run-on (paid during the four-week period immediately after the parent/carer's employment ceases, or after they start to work less than 16 hours per week). In 2011/12 the criteria had also been extended to include Child Tax Credit (without Working Tax Credit).

Notable throughout iterations of eligibility criteria is the absence of Contribution-based Jobseeker's Allowance. Families receiving this welfare benefit are not entitled to FSM.²⁴ Contribution-based Jobseeker's Allowance is paid for six months to unemployed individuals who have built up national insurance contributions through their employment.²⁵ Therefore it appears that a group excluded from FSM entitlement, and therefore the FSM measure, may be some of those whose parent/carer(s) have recently become unemployed.

The post-2013 period

In 2013, changes to social security benefits that would eventually significantly impact FSM eligibility began, as Universal Credit (UC) started its roll-out as the main single benefit to replace six legacy benefits.²⁶ The IFS describe this reform as:

...one of the most radical changes to the working-age benefit system in several decades, which will integrate six existing means-tested benefits – housing benefit, income support (IS), child tax credit (CTC), working tax credit (WTC), income-based jobseeker's allowance (JSA), and income-based employment and support allowance (ESA) – into a single payment.

They predicted that the introduction of UC 'will have major impacts on the cash incomes and incentives of different families.'²⁷

After a slow, staggered start, concentrated among people with no children, from 2016, 'Universal Credit full service begins to roll out to other Jobcentre Plus offices and expanded across the country

²² Cooper, K. (2022) 'As food poverty is set to soar, how many free school meals reach under-fives?' <https://epi.org.uk/publications-and-research/blog-as-food-poverty-is-set-to-soar-how-many-free-school-meals-reach-under-fives/>

²³ Vizard, P. et al (2023) 'Going backwards? The slowdown, stalling and reversal of progress in reducing child poverty.' <https://sticerd.lse.ac.uk/dps/case/spdo/spdorp14.pdf>

²⁴ See e.g. <https://lewisham.gov.uk/my services/education/student-pupil-support/free-school-meals-and-extra-support-for-your-child>

²⁵ 'Entitledto: Jobseekers allowance.' <https://www.entitledto.co.uk/help/jsa#:~:text=There%20are%20%20types%20of,or%20if%20you%20have%20savings.>

²⁶ House of Commons Library (2023) 'Constituency data: Universal Credit rollout.' <https://commonslibrary.parliament.uk/constituency-data-universal-credit-roll-out/>

²⁷ Joyce, R. and Waters, T. (2018) 'Free school meals under Universal Credit.' <https://dera.ioe.ac.uk/id/eprint/33174/1/BN232.pdf>

from May 2016 to include all claimant types.²⁸ It is from this point, that we may expect to see some impact on the composition of the groups of pupils recorded as FSM/non-FSM – not least because the extent and finalisation of roll-out has been slow, and has varied by area.²⁹

Initially, everyone receiving UC was eligible for FSM, in order to protect families from losing out on their entitlements during roll-out.³⁰ In 2018, an additional criterion was added, limiting FSM eligibility to UC recipients whose income was below £7,400 (excluding benefits income).³¹ Importantly, this ‘cliff-edge’ income threshold has not been updated since 2018, so is a lower threshold now in real terms – meaning people have to be more disadvantaged to be newly entitled to FSM.³²

There are still some transitional protections in place since 2018, which have continued to be extended as UC has taken longer than planned to roll out. The protections are as follows:³³

- All existing FSM claimants will continue to receive FSM even if their income rises above the threshold.
- Claimants who became eligible after 2018 will also continue to receive FSM until 2025 even if their income crosses the threshold.
- From March 2025, existing claimants that no longer meet the entitlement criteria (either in terms of income level or benefits received) will continue to receive FSM until the end of their education phase.

Whilst the UC protections will temporarily mean that there will be more advantaged pupils receiving FSM – because those who would have otherwise lost eligibility if their circumstances changed, will continue to receive FSM until the end of their education phase – the UC income threshold, which has not been updated as inflation has increased, means that pupils will need to be more disadvantaged than previously in order to newly become FSM-eligible.

Modelling and research by the IFS have indicated that the composition of the working patterns of families eligible for and therefore recorded as FSM may have shifted under the transition to UC: ‘in general, families working more hours at a lower hourly wage are more likely to be eligible for FSMs under UC than under the legacy system, and vice versa for lower-hours, higher-earning families.’³⁴

²⁸ Gov.uk (2023) ‘Universal Credit statistics.’ <https://www.gov.uk/government/publications/universal-credit-statistics-background-information-and-methodology/universal-credit-statistics-background-information-and-methodology>

²⁹ Gov.uk (2018) ‘Transition Rollout Schedule.’ <https://assets.publishing.service.gov.uk/media/5ab507c8e5274a1aa2d414d1/universal-credit-transition-rollout-schedule.pdf>

BBC (2018) ‘Universal credit rollout delayed yet again.’ <https://www.bbc.co.uk/news/uk-45870553>

³⁰ Child Poverty Action Group (2020) ‘Expanding eligibility for free school meals in England.’ <https://cpag.org.uk/sites/default/files/files/policypost/CPAG-FSM-briefing-2020.pdf>

³¹ Child Poverty Action Group (2020) ‘Expanding eligibility for free school meals in England.’ <https://cpag.org.uk/sites/default/files/files/policypost/CPAG-FSM-briefing-2020.pdf>

³² Joyce, R. and Waters, T. (2018) ‘Free school meals under Universal Credit.’ <https://dera.ioe.ac.uk/id/eprint/33174/1/BN232.pdf>

³³ Department for Education (2023) ‘Free school meals.’ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1133262/Free_school_meals.pdf

³⁴ Joyce, R. and Waters, T. (2018) ‘Free school meals under Universal Credit.’ <https://dera.ioe.ac.uk/id/eprint/33174/1/BN232.pdf>

This was in fact the intention of the Department for Education: ‘eligibility [will shift to be] based on a household’s earnings, rather than the number of hours worked.’³⁵

In 2020, the Child Poverty Action Group (CPAG) estimated that, if the income threshold were removed, an additional 1.8 million children would be entitled to FSM, the majority of whom were living in poverty.³⁶ This chimes with estimates in 2018 by the IFS that, ‘under both the UC system and the legacy system it replaces, fewer than half of the children in the lowest income quintile will be entitled to FSMs.’³⁷

The Department for Education has pushed back against CPAG’s recommendations, stating that, were ‘free school meals to be extended to all families on Universal Credit...this would mean that around half of all pupils would become eligible for free school meals, compared to a current rate of around 14%.’³⁸ In terms of the main concern of this paper and research project – the veracity and usefulness of the FSM measure – this shifting to a new threshold would not necessarily be any worse than the current cut point of the binary FSM measure.

In terms of providing security and food for children, one of the recommendations in the 2021 National Food Strategy was more conservatively to increase the UC income threshold to £20,000 (before benefits), as this ‘would ensure that 82% of children in households with “very low food security” (as defined by the Government) would be eligible for free school meals’.³⁹ Extension of FSM to more families on Universal Credit might therefore improve the propriety of the binary cut-off point of the measure, better delineating children in secure v insecure circumstances (though whether even a £20,000 threshold would capture insecurity now, during the current cost of living crisis, would need further exploration).

Overall, what this discussion re-emphasises is that the FSM measure has for some time not been fully inclusive of all children living in poverty and deprived or insecure conditions. This will be explored further later in this paper.

As well as the issues of the income threshold and the temporary protections, the introduction of UC has potentially impacted registrations as FSM-eligible via issues with taking up UC benefits in themselves. For example, in the case of tax credits recipients switching over to UC, CPAG explains: ‘UC requires claimants of tax credits to make significant adjustments to how they manage their day-

³⁵ Department for Education (2018) ‘Eligibility for free school meals, the early years pupil premium.’ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/692644/Government_response_FSM_and_EY_entitlements_under_Universal_Credit.pdf

³⁶ Child Poverty Action Group (2020) ‘Expanding eligibility for free school meals in England.’ <https://cpag.org.uk/sites/default/files/files/policypost/CPAG-FSM-briefing-2020.pdf>

³⁷ Joyce, R. and Waters, T. (2018) ‘Free school meals under Universal Credit.’ <https://dera.ioe.ac.uk/id/eprint/33174/1/BN232.pdf>

³⁸ Department for Education (2018) ‘Eligibility for free school meals, the early years pupil premium.’ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/692644/Government_response_FSM_and_EY_entitlements_under_Universal_Credit.pdf

³⁹ Gov.uk (2021) ‘National Food Strategy: Independent Review.’ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1025825/national-food-strategy-the-plan.pdf

to-day finances. UC payments are less frequent than tax credits, are primarily claimed and managed online, and claimants have their income assessed each month'.⁴⁰

The expectation of increased benefit take-up was one of the key arguments for introducing UC, and early speculation suggested that its intended simplicity may increase FSM take-up.⁴¹ However, evidence increasingly indicates that some people are reluctant to claim UC and if so, are potentially missing out also on their entitlement to FSM.⁴²

A participant in the Covid Realities research project with low-income families explains:

We have no FSM support, this causes problems as we are a low-income family. I am a single parent and self-employed with a super precarious and changeable income, but receipt of working tax credit automatically means we don't qualify. It's been like this for years. In school, this means that my children are not flagged up as struggling as many schools use FSMs as a measure of family circumstances. It has caused problems for us when I have needed to let school know that we couldn't afford some things, like a trip, technology, transport etc. It's almost like they think that I am making it up. A lack of understanding of different income-related benefits and issues such as rising in-work poverty means that schools are not good at identifying where support is needed without the FSM label. If I changed over to UC we would then be entitled but the thought of going 5 weeks with no money and the possibility of lower financial support over all is so frightening no one will do that willingly.⁴³

As highlighted by this mother, the introduction of UC may interact with previously evidenced tendencies where propensity to claim social security depends on family composition, introducing additional bias to the groups claiming and consequentially recorded as FSM-eligible.⁴⁴ On the other hand, underclaiming of benefits and consequential ineligibility for FSM has been documented since the turn of the century, and the full extent to which this has fluctuated over the years is as yet unquantified.⁴⁵

There are therefore multiple reasons why people might be reluctant to switch over to UC, and may forfeit the benefits they are entitled to including FSM. Though there was a sharp increase in UC claims among household with children in Spring 2020, estimates also suggest that around half a

⁴⁰ Child Poverty Action Group (2023) 'Worrying proportion of tax credit claimants not moving to Universal Credit – and losing their benefits.' <https://cpag.org.uk/news-blogs/news-listings/worrying-proportion-tax-credit-claimants-not-moving-universal-credit-and>

⁴¹ Joyce, R. and Waters, T. (2018) 'Free school meals under Universal Credit.' <https://dera.ioe.ac.uk/id/eprint/33174/1/BN232.pdf>

⁴² Resolution Foundation (2018) 'Boosting benefit take-up is critical to the success of Universal Credit, but we might not be able to measure whether it's working.' <https://www.resolutionfoundation.org/comment/boosting-benefit-take-up-is-critical-to-the-success-of-universal-credit-but-we-might-not-be-able-to-measure-whether-its-working/>

⁴³ Patrick, R. et al (2021) 'Fixing Lunch: The case for expanding free school meals.' https://cpag.org.uk/sites/default/files/files/policypost/Fixing_Lunch.pdf

⁴⁴ Hobbs, G. (2007) 'Investigating social class inequalities in educational attainment : The effects of schools and the validity of free school meal status as a proxy for socio-economic status.' <https://discovery.ucl.ac.uk/id/eprint/10020538/>

⁴⁵ Hobbs, G. and Vignoles, A. (2013). 'Is children's free school meal "eligibility" a good proxy for family income?' <https://doi.org/10.1080/01411920903083111>

million people who were eligible for UC at the start of the COVID-19 pandemic did not claim it.⁴⁶ Reasons for this include the perceived amount of effort it takes to apply, and feelings of stigma.⁴⁷

The Department for Work and Pensions (DWP)'s report into the managed migration of people from legacy benefits onto UC correspondingly finds that for some claimants there is a stigma associated with claiming UC, because it combines in-work and out-of-work benefits. Some families choose not to claim if they perceive the amount they are entitled to as small, and the effort and time to apply therefore not justified.⁴⁸ The DWP also found digital literacy and confidence are potentially important factors that explain the difference between people who made the switch to UC soon after receiving their letter, and those who did not. Others failed to apply for UC because they believed they would be automatically transferred.⁴⁹

CPAG highlights the scale of the problem, quoting DWP's statistics which reveal that almost a third of claimants who received a migration letter between November 2022 and March 2023 did not claim their UC, and had their benefits stopped as a result.⁵⁰ The issue of non-uptake of UC will become more significant as DWP plan to close the legacy benefit system by the end of 2024/25, apart from Employment and Support Allowance.⁵¹

In 2022, following a temporary extension of FSM entitlement to some children with no recourse to public funds (NRPF) during the Covid-19 pandemic, in 2020, FSM entitlement was permanently extended to children in all households with NRPF (providing they met the relevant income threshold).⁵² This change potentially expanded the number of recorded FSM-eligible pupils - though it is difficult to know by exactly how much. The Migration Observatory estimates that at the end of 2021, at least 224,576 non-EEA citizens under age 18 would be expected to have NRPF, though of course not all would meet the income thresholds for FSM.⁵³ In 2020 CPAG estimated that extending FSM eligibility to children in households with NRPF would result in an additional 86,000 children in England becoming FSM-eligible - though whether all entitled families have now registered their

⁴⁶ NFER (2022) 'Investigating the changing landscape of pupil disadvantage.'

<https://files.eric.ed.gov/fulltext/ED618981.pdf>

Welfare--at a social distance. 'Non-take-up of benefits at the start of the COVID-19 pandemic.'

<https://www.distantwelfare.co.uk/take-up>

⁴⁷ Welfare--at a social distance. 'Non-take-up of benefits at the start of the COVID-19 pandemic.'

<https://www.distantwelfare.co.uk/take-up>

⁴⁸ Gov.uk (2023). 'Completing the Move to Universal Credit: learning from initial Tax Credit migrations.'

<https://www.gov.uk/government/publications/completing-the-move-to-universal-credit-learning-from-initial-tax-credit-migrations/completing-the-move-to-universal-credit-learning-from-initial-tax-credit-migrations>

⁴⁹ Gov.uk (2023). 'Completing the Move to Universal Credit: learning from initial Tax Credit migrations.'

<https://www.gov.uk/government/publications/completing-the-move-to-universal-credit-learning-from-initial-tax-credit-migrations/completing-the-move-to-universal-credit-learning-from-initial-tax-credit-migrations>

⁵⁰ Child Poverty Action Group (2023) 'BENEATH THE TRENDS: A detailed look at the issues facing claimants going through managed migration.'

https://cpag.org.uk/sites/default/files/files/policypost/CPAG_managed_migration_briefing_2.pdf

⁵¹ Child Poverty Action Group (2023) 'Worrying proportion of tax credit claimants not moving to Universal Credit – and losing their benefits.' <https://cpag.org.uk/news-blogs/news-listings/worrying-proportion-tax-credit-claimants-not-moving-universal-credit-and>

⁵² <https://www.gov.uk/government/publications/free-school-meals-guidance-for-schools-and-local-authorities/providing-free-school-meals-to-families-with-no-recourse-to-public-funds-nrpf>
<https://questions-statements.parliament.uk/written-statements/detail/2022-03-24/hcws714>

⁵³ Gov.uk (2023) 'Providing free school meals to families with no recourse to public funds'
<https://migrationobservatory.ox.ac.uk/resources/briefings/children-of-migrants-in-the-uk/#kp4>

eligibility is not known, and so the extent to which and areas in which this will have changed the composition of the FSM/non-FSM-recorded groups remains to be explored.⁵⁴

Returning to Table 1, we see that, by 2021/22, the criteria for FSM entitlement has expanded compared to 2011/12, to include not only children from households with NRPF but, as discussed, families receiving Universal Credit. It seems greatly expanded compared to 2001/02, in terms of the number of criteria included. Superficially, then, it may initially appear that FSM has become more inclusive over the years in terms of eligibility criteria.

This is indeed the case with the extension to include children from households with NRPF. However, some of what initially looks like more inclusive criteria seems simply to be a reflection of changes in benefits. As new benefits have been created, since the turn of the century, they have been added to the list - though many families receiving these categories of social security have shifted from receiving others, and would have previously fallen under a different category on the FSM entitlement criteria, such as Income Support.

In other ways the criteria for FSM have become more restrictive. As noted, the income threshold introduced for those in receipt of UC has not been adjusted since 2018, despite inflation and the cost-of-living crisis. We detailed how the switch-over to UC has potentially led to some claimants not taking up the benefits they are entitled to, therefore forfeiting their potential entitlement to FSM.

How all of this plays out in terms of changes to the composition of the groups of children recorded as FSM-eligible/non-eligible in the NPD data is something that will be explored in subsequent strands of this project, informed by the evidence here. Considering the validity of the FSM measure in the noughties, Hobbs (2007) reported that the 'vast majority' of children eligible for FSM 'were in families with one parent.'⁵⁵ Whether this or other background factors have changed with alterations to the social security context and requirements for eligibility is something we will investigate.

What is immediately clear, however, is that these most recent years in particular have seen changes to benefits entitlements and processes for claiming benefits that may well result in extra under-identification of some children who are entitled and could be recorded as FSM-eligible. The murky complexity, however – that we will try to unpick through data analyses and further review – is that this coexists with continued legacy FSM status among families previously meeting criteria, who continue under transitional arrangements. And in terms of theoretical entitlements (whether claimed or not claimed), the IFS has estimated that a roughly equal number of families will lose and gain FSM eligibility under UC.⁵⁶

This results in an increasing lack of clarity about the composition of the group of children recorded as FSM-eligible/non-eligible in the NPD, which has become particularly muddled since the roll-out of UC. The FSM group currently includes those whose family circumstances have improved, who would no longer be eligible if it were not for protection by transitional arrangements – alongside some of

⁵⁴ Child Poverty Action Group (2020) 'Expanding eligibility for free school meals in England.'

<https://cpag.org.uk/sites/default/files/files/policypost/CPAG-FSM-briefing-2020.pdf>

⁵⁵ Hobbs, G. (2007) 'Investigating social class inequalities in educational attainment : The effects of schools and the validity of free school meal status as a proxy for socio-economic status.'

<https://discovery.ucl.ac.uk/id/eprint/10020538/>

⁵⁶ Joyce, R and Waters, T (2018) 'Free school meals under Universal Credit'

<https://dera.ioe.ac.uk/id/eprint/33174/1/BN232.pdf>

those who are newly, currently eligible: but who must meet what are now more stringent criteria to be registered for FSM. This is reflected in Thomson's 2021 analyses showing that since 2018, the FSM group has increasingly been composed of those already/previously eligible, while numbers of newly-eligible pupils flatlined until the COVID pandemic began.⁵⁷

The non-FSM group includes those who are entitled to low-income benefits, but who lost both these benefits and their opportunity to apply to FSM, due to failed migration to UC: those who may be particularly disadvantaged. Overall, as Pataro et al (2020) state, the many:

...changes in eligibility criteria may [have been] necessary for pragmatic reasons but they have nothing to do with changes in social need or disadvantage, raising the question whether they can effectively [be] used to accurately capture social disadvantage for research purposes.⁵⁸

General trend in changes to entitlements for FSM-eligible social security benefits over the past two decades

Aside from the procedural issues with migration from one benefit-type to another and underclaiming of FSM-conferring benefits, it is also important to note significant changes in the criteria for receipt of the benefits themselves that in turn qualify families for FSM. This is a further component which helps with interpreting how FSM entitlement and the resulting FSM-recorded group have changed over time. It may underpin compositional changes to the FSM/non-FSM groups, and tell us how comprehensively and / or consistently FSM may have captured children who might be assumed to be disadvantaged.

Below we therefore consider overall trends in benefits generosity, criteria, and entitlements. During the period of focus, 2001/2 to present, there have been significant amendments to the overall tax and social security system, that are relevant when thinking about how potential FSM registration has shifted.

One adjustment particularly pertinent to families is the enormous decrease in the period for which lone parents have been entitled to Income Support. In 2008, lone parents with a child aged up to 15 were eligible; by 2012, this had fallen to age five.⁵⁹ In terms particularly of whether their social security benefits qualify their children for FSM, this suggests that there may potentially be a compositional shift in the family structure of those recorded as FSM eligible over the years. The

⁵⁷ Thomson (2021) 'How free school meal eligibility has been changing and why we might need new measures of disadvantage.' <https://ffteducationdatalab.org.uk/2021/10/how-free-school-meal-eligibility-has-been-changing-and-why-we-might-need-new-measures-of-disadvantage/#:~:text=It%20has%20been%20rolling%20out,income%20threshold%20was%20henceforth%20imposed.>

⁵⁸ Pataro, S. et al (2019) 'Using Linked Longitudinal Administrative Data to Identify Social Disadvantage.' <https://link.springer.com/article/10.1007/s11205-019-02173-1#:~:text=Administrative%20data%20are%20widely%20used,Multiple%20Deprivation%2C%20for%20policy%20purposes.>

⁵⁹ DWP (2014) 'Income Support Lone Parents by Jobcentre Plus District and Age of Youngest Child.' https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/286997/is-lp-by-jcp-district.pdf

move to UC has also feasibly affected lone parents, plausibly increasing entitlement, and may again play into the composition of the FSM group in later years.⁶⁰

Aside from a decreasing generosity specifically for lone parent families, until 2010, under New Labour, there was more generally an uplift in welfare entitlements. This came in the form of other increases in Income Support and the introduction and expansion of the tax credits system. There was an associated decline in poverty for families with children.⁶¹

In terms of what this means for recorded FSM eligibility and composition, it potentially may have enabled some pupils to access FSM, when they became entitled via their family's receipt of child tax credit. In terms of the relationship between recorded FSM eligibility and levels of disadvantage, this was a period where benefits were more generous and poverty for families with children declined – and so the FSM category may have increasingly included pupils who were relatively more advantaged compared to preceding years. At the high level, analysis for the House of Commons shows that overall levels of FSM fell until 2008, so the pattern net of all this in this period was a fall in the proportion of pupils recorded as FSM (see Figure 2).⁶² We will explore the variation underneath this, and which families were affected in empirical analyses.

Since 2010, first under the Coalition government (2010-2015) and then continued under the Conservative governments (2015 to present), there has been significant welfare reform. This has been characterised by increased conditionality, as well as a decrease in the generosity of working-age benefits.⁶³ Stricter conditions were introduced for disability benefits, and UC and Jobseeker's Allowance claimants were now required to meet more conditions to receive the benefit in terms, for example, of looking for work. This included in-work conditionality for the first time, with the consequence of receiving sanctions removing benefits eligibility and payments.⁶⁴ Evidence on whether or not UC has increased employment is mixed (for further discussion on this see Cooper and Hills, 2021) so it is unlikely that UC reduced the need for FSM via its employment effects.⁶⁵

The decrease in the generosity of working-age benefits played out through a number of channels, including the introduction of the benefit cap, the 'two child limit', the 'bedroom tax', the freeze in Local Housing Allowance, changes to tax credits to make them less generous, and UC providing less substantial levels of benefit compared to legacy benefits. In addition, benefits were cut in real terms

⁶⁰ Joyce, R and Waters, T (2018) 'Free school meals under Universal Credit'

<https://dera.ioe.ac.uk/id/eprint/33174/1/BN232.pdf>

⁶¹ Lupton, R. et al (2013) 'Labour's Social Policy Record: Policy, Spending and Outcomes 1997-2010.'

https://eprints.lse.ac.uk/51070/7/CASE_Labours_social_policy_record_summary.pdf

⁶² Francis-Devine et al (2023) 'Food poverty: Households, food banks and free school meals.'

<https://researchbriefings.files.parliament.uk/documents/CBP-9209/CBP-9209.pdf> (p28)

⁶³ Gov.uk '2010 to 2015 government policy: welfare reform.'

<https://www.gov.uk/government/publications/2010-to-2015-government-policy-welfare-reform/2010-to-2015-government-policy-welfare-reform>

Hills, J. (2015) 'The Coalition's Record on Cash Transfers, Poverty and Inequality 2010-2015.'

<https://sticerd.lse.ac.uk/dps/case/spcc/wp11.pdf>

Cooper, K. and Hills, J. (2021) 'The Conservative Government's Record on Social Security: Policies, Spending and Outcomes, May 2015 to pre-COVID 2020.'

<https://sticerd.lse.ac.uk/CASE/new/publications/abstract/?index=7765>

⁶⁴ Cooper, K and Hills, J. (2021) Ibid

⁶⁵ Cooper, K and Hills, J. (2021) Ibid

from 2012, as they were uprated by less than inflation. These changes were accompanied by an increase in relative child poverty and an increase in in-work poverty.⁶⁶

How was this likely to have impacted rates of FSM and the composition of the FSM/non-FSM-recorded groups post-2010? It may have made it more difficult for pupils to access FSM status as it became harder to qualify for the benefits required for FSM eligibility. Potentially, also, a number of features of UC (which was introduced during this period), may have resulted in some people not claiming the benefits they are entitled to: as discussed above, although we cannot compare non-take up of benefits over time, there is evidence that a sizeable proportion of people eligible for UC (both newly eligible during the pandemic and those migrating from legacy benefits) have not claimed UC, due to a number of reasons including the perceived amount of effort it takes to complete the application process and meet the conditions. This may translate as a reduction in the number of pupils that were consequentially recorded as FSM-eligible. The Department for Education's reporting that HMRC data indicated a fall between 2012 and 2013 in the proportion of families meeting the criteria for FSM eligibility supports this possibility.⁶⁷

CPAG highlight that as in-work poverty has grown, entitlement to FSM has fallen because of the income threshold.⁶⁸ At the same time, the decline in generosity of benefits, and the increase in poverty for families with children, implies that overall levels of disadvantage may have become higher for the group recorded FSM-eligible, compared to those FSM-eligible in the noughties. So according to these underlying factors, we might potentially expect registered FSM-eligible pupils to have become more disadvantaged under the Coalition and the Conservatives, at least until UC transitional arrangements began – and perhaps even then.

The net result of all of this, as well as the surrounding economic context, is a rise in the proportion of pupils recorded as FSM-eligible until 2013, and a subsequent fall until 2018 – as seen in Figure 2.⁶⁹

Large-scale expansions of free school meals to pupil groups

As well as changes in the main entitlement criteria, and the wider context of these eligible benefits, there have been moments of significant expansion of free school meals to particular groups. While since 1996, FSMs included pupils aged over 16 years at maintained school sixth forms, in 2014, entitlement was extended to disadvantaged students (meeting the benefits and income criteria) following further education (FE) courses at the full range of FE-funded institutions.⁷⁰ While the Department for Education's documentation for the latest year confirms the continuation of this

⁶⁶ Cooper, K and Hills, J. (2021) Ibid

⁶⁷ Lord et al (2013) 'Pupils not claiming Free School Meals (2013).'

<https://www.gov.uk/government/publications/pupils-not-claiming-free-school-meals-2013>

⁶⁸ CPAG, (2020) 'Expanding eligibility for free school meals.'

<https://cpag.org.uk/sites/default/files/files/policypost/CPAG-FSM-briefing-2020.pdf>

⁶⁹ Francis Devine et al (2023) 'Food poverty: Households, food banks, and free school meals.'

<https://researchbriefings.files.parliament.uk/documents/CBP-9209/CBP-9209.pdf>

⁷⁰ Gov.uk (2022) 'Free meals in further education funded institutions.'

<https://www.gov.uk/government/publications/free-meals-in-further-education-funded-institutions-guide-2022-to-2023-academic-year/free-meals-in-further-education-funded-institutions>

entitlement, the extent to which it is implemented is unclear, and some of the Department's documentation appears contradictory.⁷¹

Also in 2014, universal infant free school meals (UIFSM) were introduced. Under UIFSM, all children in reception, year one and year two are eligible to receive meals, regardless of whether or not they meet the benefits and income eligibility criteria still required for FSM for older children.⁷² We discuss the implications of this expansion for identification of children as FSM-eligible in Section two.

In 2023 the Mayor of London announced universal free school meals for all primary school children for the 2023/24 academic year.⁷³ This followed pre-existing local policies in selected boroughs already implementing universal primary FSM. It was also foreshadowed by Department for Education-backed pilots of universal meals in areas outside of London, for limited time periods in the previous decade.⁷⁴

The wider context of FSM eligibility: What else does FSM status confer?

The Pupil Premium

As well as conferring a free school meal, recorded FSM eligibility has come to be a passport to a number of other entitlements. In 2011 Pupil Premium was introduced. Its intention was to provide state schools with additional funding and focus to improve educational outcomes for disadvantaged children.⁷⁵

Attracting Pupil Premium is contingent on the individual child being recorded eligible for FSM. In April 2012, the criteria were extended to include those who had been eligible for free school meals

⁷¹ Gov.uk (2023) 'Free meals in further education funded institutions guide: 2023 to 2024 academic year.' <https://www.gov.uk/government/publications/free-meals-in-further-education-funded-institutions-guide-2023-to-2024-academic-year/free-meals-in-further-education-funded-institutions-guide-2023-to-2024-academic-year>

Gov.uk (2023) 'Schools, pupils and their characteristics.' <https://explore-education-statistics.service.gov.uk/find-statistics/school-pupils-and-their-characteristics>

⁷² DfE (2014) 'Department for Education 'Evidence check' memorandum Universal infant free school meals (UIFSM).' <https://www.parliament.uk/globalassets/documents/commons-committees/Education/evidence-check-forum/Universal-infant-free-school-meals.pdf>

⁷³ London.gov.uk 'Free school meals.' <https://www.london.gov.uk/who-we-are/what-mayor-does/priorities-london/free-school-meals>

⁷⁴ Evening Standard (2023). 'Almost 300,000 pupils in London will get mayor's free school meals.' <https://www.standard.co.uk/news/london/sadiq-khan-free-school-meals-mayor-london-borough-data-b1102251.html#:~:text=Five%20London%20boroughs%20%2D%20Islington%2C%20Newham,for%20all%20primary%20school%20children.>

Financial Times (2023) 'The numbers behind London's free school lunch scheme.' <https://www.ft.com/content/cbcb7d44-67e6-409e-912c-157e6361f860>

Gov.uk (2012) 'Free school meals pilot: impact report.' <https://www.gov.uk/government/publications/evaluation-of-the-free-school-meals-pilot-impact-report>

⁷⁵ Ofsted (2012) 'The pupil premium.' https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/413222/The_Pupil_Premium.pdf

Gov.uk 'Pupil premium: overview.' <https://www.gov.uk/government/publications/pupil-premium/pupil-premium#purpose>

at any point in the previous six years.⁷⁶ In addition to FSM, Pupil Premium is also paid to schools based on the number of looked-after children as well as the number of previously looked after children and children with parents/carers in the regular armed forces.⁷⁷ Focusing on FSM-related Pupil Premium, the rates of funding that schools receive per child in 2023-24 are £1,455 for primary schools and £1,035 for secondary schools.⁷⁸

Because Pupil Premium eligibility is tied to recorded FSM eligibility, it does not include all intended children - because there are some who meet the criteria to receive FSM, but are not registered and known to be eligible.⁷⁹ There is currently no estimate of the number of children who are entitled to FSM/Pupil Premium but are not registered to receive it.⁸⁰

This differs slightly from the Early Years Pupil Premium (EYPP), which has the same eligibility criteria as Pupil Premium for older children in statutory education - but is not accessed via the mechanism of known FSM eligibility. Instead, early years providers are responsible for identifying children specifically as EYPP-eligible.⁸¹ EYPP is paid for children aged three and over, and the rate per child in 2023-24 is £353.⁸²

Notably, Pupil Premium payments for children in reception-year two remain tied to families being registered as FSM-eligible. As all parents/carers have been able since 2014 to access meals for their children without applying during the first three years of school, there has been a slight drop in the number of children who were recorded as FSM-eligible after that point.⁸³ There is likely therefore to be an undercount of those entitled to FSM since 2014, at least in the first years of primary school.

The nuances of and potential issues with Pupil Premium as an indicator and tool for prioritising pupils are discussed further in Section three.

Holiday Activities and Food Programme

In 2018 the Holiday Activities and Food Programme (HAF) was piloted, before being rolled out to all local councils in England in 2021. The programme is designed to provide support during school holidays for disadvantaged children, in the form of enriching activities and healthy food. Children

⁷⁶ Ofsted (2012) 'The pupil premium.'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/413222/The_Pupil_Premium.pdf

⁷⁷ Gov.uk (2023) 'Pupil premium 2023-24: conditions of grant for local authorities.'

<https://www.gov.uk/government/publications/pupil-premium-allocations-and-conditions-of-grant-2023-to-2024/pupil-premium-2023-to-2024-conditions-of-grant-for-local-authorities>

⁷⁸ Gov.uk (2023) 'Pupil premium 2023-24: technical note.' <https://www.gov.uk/government/publications/pupil-premium-allocations-and-conditions-of-grant-2023-to-2024/pupil-premium-2023-to-2024-technical-note--2>

⁷⁹ Roberts, N. (2023) 'The pupil premium (England).'

<https://researchbriefings.files.parliament.uk/documents/SN06700/SN06700.pdf>

⁸⁰ UK Parliament (2017) 'Children: Disadvantaged.' <https://questions-statements.parliament.uk/written-questions/detail/2017-11-06/111683>

⁸¹ <https://www.gov.uk/government/publications/early-years-funding-2023-to-2024/early-years-entitlements-local-authority-funding-operational-guide-2023-to-2024#early-years-pupil-premium-eypp>

⁸² Gov.uk (2023) 'Early years entitlements: local authority funding operational guide 2023 to 2024.'

<https://www.gov.uk/government/publications/early-years-funding-2023-to-2024/early-years-entitlements-local-authority-funding-operational-guide-2023-to-2024#early-years-pupil-premium-eypp>

⁸³ Holford, A. and Rabe, B. (2020) 'Impact of the universal infant free school meal policy.'

<https://www.nuffieldfoundation.org/project/impact-of-the-universal-infant-free-school-meal-policy>

can access the programme if they are in reception to year 11 and are recorded as FSM-eligible.⁸⁴ Additionally, local authorities can use up to 15% of their funding to provide free or subsidised holiday club spaces to children who do not receive FSM, but who they believe would benefit from the programme, such as young carers. They are encouraged to make the programme available to all other children who can pay to attend.⁸⁵ The extent to which these clubs are, in practice, attended by a mix of children including those not identified as FSM-eligible is, to the authors' knowledge, unavailable.

The programme runs during the Summer, Easter and Christmas holidays. All food provided must meet the school food standards. In addition to providing at least one healthy meal a day HAF must provide:

- Fun and enriching activities to give children opportunities to develop new skills, try new experiences and socialise.
- Physical activities that meet physical activities guidelines, on a daily basis.
- Nutritional education each day aimed at improving children's knowledge and awareness of healthy eating.

Additionally, the HAF is an opportunity to involve the family, and it is expected as part of the programme that there is an opportunity for weekly training and advice sessions for parents/carers with a focus on how to prepare low-cost nutritious food.⁸⁶ Another function of HAF is to signpost and refer parents/carers to support and services they could benefit from. Therefore, in theory at least, and alongside accompanying national holiday food voucher schemes, the HAF provides a meaningful incentive for families to sign up as FSM-eligible, and a substantial intervention and source of different kinds of support for these families.⁸⁷

The Recovery Premium

Children who are recorded as eligible for FSM, and thereby attract Pupil Premium funding, are also eligible for the Recovery Premium. This is part of government funding to support pupils whose education has been impacted by Covid-19. It is a temporary grant for state-funded schools across the academic years 2021-22 to 2023-24. Because it is allocated according to Pupil Premium eligibility, schools receive Recovery Premium funding for every pupil who has been recorded as eligible for FSM in the last six years (in addition to children looked after by local authorities or previously looked after by local authorities).

In 2023-24, schools receive £145 per eligible pupil in primary schools and £276 per eligible pupil in secondary schools, with the still relatively small but higher rate for secondary schools justified on the

⁸⁴ Gov.uk (2022) 'Holiday activities and food programme 2023.'
<https://www.gov.uk/government/publications/holiday-activities-and-food-programme/holiday-activities-and-food-programme-2023>

⁸⁵ Gov.uk 'What you need to know about the holiday activities and food programme.'
<https://educationhub.blog.gov.uk/2022/04/06/what-you-need-to-know-about-the-holiday-activities-and-food-haf-programme-2/>

⁸⁶ Gov.uk (2022) 'Holiday activities and food programme 2023.'
<https://www.gov.uk/government/publications/holiday-activities-and-food-programme/holiday-activities-and-food-programme-2023>

⁸⁷ Gov.uk (2021) 'National free school meals voucher scheme opens to orders.'
<https://www.gov.uk/government/news/national-free-school-meals-voucher-scheme-opens-to-orders>

grounds of evidence that the pandemic has had a greater impact on the education of secondary school pupils, and that they have less time left in school.⁸⁸ As with Pupil Premium, guidance stipulates that schools must spend this funding on the approaches set out by the Department for Education.⁸⁹ Whether this additional premium enhances the incentive for schools to promote sign-up for FSM remains to be explored.

Other linked local entitlements

Recorded FSM eligibility is also used at a local level to confer additional resources and entitlements to pupils. For example, some LAs offer help with the cost of school uniform to children denoted FSM.⁹⁰ Others provide vouchers for food during holiday periods to children recorded as FSM-eligible.⁹¹ At the school-level, discounts on trips and extra-curricular activities may be offered to registered pupils.⁹² Some LAs also offer school trip grants to FSM-eligible children - but to further complicate the picture, this may only be for children attending LA-maintained schools, while academies may decide their own policies regarding distribution of additional funding to prioritised children.⁹³

As these schemes and entitlement vary by area, this raises at least two issues when considering the consistency of FSM as a measure. Firstly, differential incentives for sign-up depending on where a family lives and the school their child attends may lead to variation in registration as eligible. Secondly, the potential meaning, tangible benefits, and impacts of being recorded as FSM-eligible will depend on what a child receives through these linked entitlements, aside from access to free meals, at the local level. Even the funds assigned per child by local government do not translate directly to a requirement to spend a certain amount on food for each individual at the group level.⁹⁴ Additionally, not all children recorded as FSM-eligible take up their free meal on an everyday basis (one survey estimate for the Department for Education suggested 25% did not, and that this varies by school and local factors), and some local audits put this figure as much higher.⁹⁵

⁸⁸ Gov.uk (2023) 'Recovery premium: overview.' <https://www.gov.uk/government/publications/recovery-premium-funding/recovery-premium-funding>

⁸⁹ DfE (2023) 'Using pupil premium: guidance for school leaders.' https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147853/Using_pupil_premium_guidance_for_school_leaders.pdf

⁹⁰ E.g. Westminster.gov.uk 'Council funding for school uniforms extended until July 2024.' <https://www.westminster.gov.uk/news/council-funding-school-uniforms-extended-until-july-2024#:~:text=The%20extension%20of%20the%20scheme,start%20in%20Reception%20from%20September>. Croydon.gov.uk 'Free school meals and help with uniform costs.' <https://www.croydon.gov.uk/schools-and-education/schools/free-school-meals-and-help-uniform-costs>

⁹¹ Newham.gov.uk 'Free school meals.' <https://www.newham.gov.uk/schools-education/free-school-meals/5> Fairlawn School (online, nd) 'Free School Meals and Pupil Premium.' <https://www.fairlawnschoolbristol.org/922/free-school-meals-and-pupil-premium>

⁹² E.g. <https://www.melbournprimaryschool.org.uk/pupil-premium/> <https://www.kilmorieschool.co.uk/site/data/files/users/key-info/DB513581C14EF536A440432CF6AEEA6A.pdf>

⁹³ E.g. https://www.royalgreenwich.gov.uk/info/200285/about_our_schools/395/apply_for_free_school_meals_and_other_grants_for_school_pupils

⁹⁴ Long, R. and Danechi, S. (2023) 'School Meals and Nutritional Standards (England).' <https://researchbriefings.files.parliament.uk/documents/SN04195/SN04195.pdf>

⁹⁵ Tower Hamlets Council (2023) 'Recommendations for the delivery of Universal Free School Meals (UFSM) to secondary school pupils in KS3 & 4.' <https://democracy.towerhamlets.gov.uk/mgConvert2PDF.aspx?ID=217274>

In sum, this both adds to the ambiguity in terms of what being FSM-eligible means and confers, in practice, and decouples the measure of FSM eligibility from receipt of meals.⁹⁶ If we view FSM status as an intervention within education, it is an intervention whose parameters are now very unclear.

⁹⁶ Wollny, I. et al (2015) 'School lunch take-up survey 2013 to 2014.'
[https://assets.publishing.service.gov.uk/media/5a7e1f50ed915d74e62243f4/RR405 - School Lunch Take-up Survey 2013 to 2014.pdf](https://assets.publishing.service.gov.uk/media/5a7e1f50ed915d74e62243f4/RR405_-_School_Lunch_Take-up_Survey_2013_to_2014.pdf)

Section two: How are children recorded as FSM-eligible, and how has this changed over time?

This section considers the policies and bureaucratic procedures through which individual children may be denoted in the NPD as FSM-eligible. Evidence reviewed in Campbell and Obolenskaya (2021) began to suggest variations here at the local level, which may impact or bias take-up and attribution of children as FSM/non-FSM.⁹⁷ These variations can be substantial: estimates from the Department for Education suggest that in 2013, some local authorities saw 38% of entitled children not recorded as FSM-eligible - while others were estimated to have full registration.⁹⁸

Here we outline the official guidance on FSM applications, and suggest key policy events that may have impacted the FSM application process. We describe the roles of government, schools, local authorities, and parents/carers in FSM sign-up. We highlight different possible routes to being denoted FSM, with more or less input from parents/carers, and describe evidence on parents/carers' experiences of application.

What is the official policy on the application process for FSM?

In order to be denoted as FSM-eligible, in addition to meeting the benefits and income eligibility requirements, an application must be made for FSM: The Department for Education states, 'A pupil is only eligible to receive a free school meal when a claim for the meal has been made on their behalf and their eligibility, or protected status, has been verified by the school where they are enrolled or by the local authority.'⁹⁹

Though there is government guidance (discussed below), the application process for FSM is left to schools, and so there is variation in what parents/carers are required to do in order to apply. Individual schools are responsible for checking eligibility, though they can also work with local authorities to do this. In terms of the application process, it is up to schools to decide whether to use online or paper applications, though, if they choose online, they are encouraged to have an alternative for people who cannot apply online.¹⁰⁰

What are the roles of government, schools, local authorities and parents?

Government

The Government sets national policy in relation to FSM. To support schools and local authorities, it currently provides an Eligibility Checking System (ECS), as well as a model registration form. The ECS

⁹⁷ Campbell, T. and Obolenskaya, P. (2021) 'No such thing as a free lunch? Exploring the consistency, validity, and uses of the 'Free School Meals' (FSM) measure in the National Pupil Database.'

<https://sticerd.lse.ac.uk/CASE/NEW/PUBLICATIONS/abstract/?index=8641>

⁹⁸ Lord, A. et al (2013) 'Pupils not claiming free school meals: 2013.' <https://dera.ioe.ac.uk/id/eprint/19502/>

⁹⁹ DfE (2023) 'Free school meals.'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1133262/Free_school_meals.pdf

¹⁰⁰ DfE (2023) Ibid

allows local authorities to check data from the Department for Work and Pensions, the Home Office, and HMRC, in order to determine entitlement according to income and benefits receipt.¹⁰¹

The ECS also enables schools/local authorities to re-check the FSM eligibility of all those who have submitted their details, though there is no official policy on the frequency with which schools should be re-checking, and there appears to be variation in this, as described below. The most recent example FSM registration form invites parents/carers to inform them of any changes in circumstance, suggesting re-checks are not solely relied upon to ensure up-to-date eligibility, but that self-reporting plays a part.¹⁰²

Frequency of checking may in itself impact the pupils included as FSM-eligible due to flux in family circumstances. In the empirical qualitative research that will follow during this project, we will explore processes of checking and re-checking, and how they have varied over time and place.

The Government also shares best practice from the schools and local authorities who ‘are most effective at encouraging free school meal registration’ – which is interesting not least because it is a tacit admittance of the incompleteness of sign-up and therefore of coverage of FSM, with implications for the Government’s own uses of the measure. Finally, to help raise awareness of FSM for parents, the Government provides guidance to Jobcentre Plus advisors and work coaches so that they can make Universal Credit recipients aware that they may also be entitled to FSM.¹⁰³

Schools and local authorities

The responsibility for encouraging applications for FSM, making parents/carers aware of the application process for FSM, and for checking FSM eligibility lies with individual schools, who are also able to work with their local authority.¹⁰⁴ The extent to which this varies, and differs for academy schools, will be explored in this project's empirical strand. There appear to be differences in practice across schools and LAs. Some LAs are more proactive in their approach to encouraging FSM applications, as discussed below.

There is an awareness amongst schools of the potential stigma attached to applying for FSM, and of how the framing of the application process may influence the willingness of parents/carers to sign up.¹⁰⁵ The Government's guidance encourages schools and LAs to frame the application in terms of the potential to gain more funding for their child’s school through the associated Pupil Premium attached to FSM.¹⁰⁶ In practice, this does appear to be the strategy that many schools use, as research has found that ‘when encouraging families to register for FSM, most schools surveyed (80% of both primary and secondary schools) did tell parents/carers that this would increase the funding the school gets.’¹⁰⁷

This is interesting given evidence, discussed in the previous section, that FSM status can entitle families to various, individual-level, extra benefits, supplements, and grants (including for uniforms,

¹⁰¹ DfE (2023) Ibid

¹⁰² DfE (2023) Ibid

¹⁰³ DfE (2023) Ibid

¹⁰⁴ DfE (2023) Ibid

¹⁰⁵ Woodward, J et al (2015) ‘Interventions to increase free school meal take-up.’

<https://eprints.leedsbeckett.ac.uk/id/eprint/1204/>

¹⁰⁶ DfE (2023) Ibid

¹⁰⁷ DfE (2013) ‘Evaluation of Pupil Premium’ <https://dera.ioe.ac.uk/id/eprint/18010/1/DFE-RR282.pdf>

trips, and holiday vouchers). The psychology and impacts on sign-up of appealing to collective responsibility for school funding when encouraging FSM application may differ by social or demographic group, or by other family factors.

Parents and carers

Depending on which school children attend and which local authority families live in, the evidence indicates a more or less involved application process. In all cases, however, parents/carers will need to share their personal information and national insurance number for eligibility checks.

We ran through the online procedures from a number of angles to gain initial example snapshots of the application journey for parents/carers. This will be explored in more detail in our qualitative research strand.

If parents/carers begin by seeking information on FSM from the government website, the website then uses a postcode checker to redirect them to their local council for information. However, trial runs of this uncovered errors, such as being redirected to a broken link, and having to search for the council website manually.¹⁰⁸

In the case of one particular council we trialled, once the council page is found, there is a link to apply online, or a paper form can be posted – though this form still needs to be downloaded and printed from the website in order to do this.¹⁰⁹

The council here only asks for parents/carers to apply if they currently meet the eligibility criteria. If using the online application form, this requires registering for an account, and verifying it through an email address. This is followed by another broken link, then setting up a profile, then arriving at a page that suggests going back to the original page from which the account registration process began. The application is described as taking 15 minutes. Parents/carers are told to update the council when there are any changes either to benefits or if their child moves school during the school year.

When simulating the application process for parents/carers with this example council, there were a number of issues that might deter applications, or at least make it more difficult and time-consuming. This includes broken web links that are supposed to direct parents/carers to the relevant council page, having to register for an account in order to apply, and having to download and print the application if unable to apply online. Parents/carers for whom English is a second language, or who have literacy difficulties, or some other needs may find the process yet more onerous.

There are alternative methods of applying, which are detailed below, and will be explored during this research - alongside changes to these processes over the years. But this example of one mode begins to highlight imperfections in the journey, which may differentially impact various groups of families and impact which children end up registered as FSM-eligible.

¹⁰⁸ Gov.uk 'Apply for free school meals.' <https://www.gov.uk/apply-free-school-meals>

¹⁰⁹ <https://www.westsussex.gov.uk/education-children-and-families/schools-and-colleges/free-school-meals/>

Applying for FSM when self-employed

For parents/carers who are self-employed the application process is more involved, because their eligibility check must be done manually.¹¹⁰ They must provide proof they are receiving Universal Credit (UC) in the form of their UC award letter; proof of self-employment in the form of a copy of their company registration or tax return form; proof their monthly earnings do not exceed the earnings threshold, and complete a self-declaration form.¹¹¹

Different routes to identification as FSM-eligible

Automatic enrolment

As discussed above, there is variation across schools and local authorities in terms of the approaches taken to identification of families as FSM-eligible – with different levels of involvement required by parents/carers.¹¹² The approach requiring the least input from parents/carers is automatic enrolment. This is when the necessary details from parents/carers are used to check eligibility without them having to actively apply.

This can be through schools collecting all parents/carers' information, for example, as part of the onboarding of all students at school, or when parents/carers share the necessary details with authorities for another reason (for example, to access benefits). Alternatively, it can involve councils proactively analysing benefits-related data for all parents/carers.¹¹³

Here, rather than requiring parents/carers to actively apply and opt-in, they are automatically included in eligibility checks. This approach potentially increases uptake of FSM because those who are entitled but would not have applied (for many potential reasons) are automatically included. A recent trial by Lewisham Council found over 500 families who were entitled but not registered.¹¹⁴ They achieved this by analysing data across different teams and departments to confirm entitlement. Eligible parents/carers were then notified that the council would be applying for FSM on their behalf, unless they opted out.

This process is currently not straightforward for councils, as they do not have access to the benefit data that would enable eligibility to be directly determined, and so involves additional work, coordination, and costs. For councils who are likely to identify a lot of pupils not claiming the FSM eligibility they are entitled to, this additional effort has clear incentives, not only in increasing access to FSM, but also in terms of the additional funding that their schools receive through the associated Pupil Premium. Lewisham will eventually receive an additional £1.2 million additional funding due to the increase in FSM uptake from automatic enrolment.¹¹⁵

¹¹⁰ Gov.uk (2023) 'Free school meals.'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1133262/Free_school_meals.pdf

¹¹¹ Gov.uk (2023) Ibid

¹¹² Sahota, P. et al (2014) 'Factors influencing take-up of free school meals in primary- and secondary-school children in England.' <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10282406/>

¹¹³ Schoolsweek (2023) 'Council's £800 exercise results in £1.2m school funding boost' <https://schoolsweek.co.uk/councils-800-exercise-results-in-1-2m-school-funding-boost/>

¹¹⁴ Schoolsweek (2023) ibid

¹¹⁵ Schoolsweek (2023) ibid

Other LAs with potentially a smaller amount to gain might be less likely to take this approach. At the time of writing, there is no systematic source of information on which areas use a similar strategy - something we will explore in the empirical research.

There are calls to make it easier for councils to have access to the necessary data and to make automatic enrolment for FSM a national policy. This was one of the recommendations in the National Food Strategy, in order to increase access to free school meals.¹¹⁶ The Local Government Association estimates that automatic enrolment would bring into the system the 11% of entitled children estimated to have not claimed FSM eligibility, which equates to around 215,000 school children in England.¹¹⁷ However, note this estimate of underclaiming is based on analysis from 2012/13.¹¹⁸

Although there have been calls to make automatic enrolment a national policy, a private members bill on automatic enrolment of FSM-entitled children did not make it to a second reading in 2015 – and currently, there is no plan to introduce automatic enrolment at a national level.¹¹⁹ Local variation therefore remains and has developed over the years, and will underpin some of the disparities in recorded take-up and proportions of entitled children denoted as FSM/non-FSM-eligible in the NPD.

Applications via schools and local authorities

Our review of documents suggests that currently, in many cases, parents/carers still have to make an active application for their child to receive FSM. Within this approach there is local variation in who is encouraged to apply. In some instances, the invitation is inclusive - for example, Newham council requests that all families apply for FSM, regardless of their employment or immigration status. In Newham, applications are re-checked every week to maximise the number of children recorded as FSM-eligible. This quickly includes any newly eligible children, whilst minimising the effort required by parents, who only need to fill in their details once. The same details are used regardless of whether children change schools within the borough and when children move from primary to secondary school. They are also used for all children within an immediate family, so separate applications are not necessary.¹²⁰

Notably, Newham has for some time offered universal primary free school meals, regardless of recorded FSM status.¹²¹ So this authority's identification of children as FSM-eligible is de-coupled

¹¹⁶ National Food Strategy (2021) <https://www.nationalfoodstrategy.org/the-report/>

¹¹⁷ Local Government Association (2022) 'Free school meals: One million more school children could be fed if the sign-up process eased, councils urge.' <https://www.local.gov.uk/about/news/free-school-meals-one-million-more-school-children-could-be-fed-if-sign-process-eased>

¹¹⁸ Parliament.uk (2023) 'Free School Meals: Question for Department for Education' <https://questions-statements.parliament.uk/written-questions/detail/2023-03-14/165185/>

¹¹⁹ Parliament.uk 'Free School Meals (Automatic Registration of Eligible Children) Bill.' <https://bills.parliament.uk/bills/1728/stages>

Parliament.uk (2023) 'Free School Meals: Question for Department for Education' <https://questions-statements.parliament.uk/written-questions/detail/2023-03-14/165185/>

¹²⁰ Newham.gov.uk. 'Free School Meals.' <https://www.newham.gov.uk/schools-education/free-school-meals/4>

¹²¹ Newham.gov.uk (2018) 'Newham Universal Free School Meals.' <https://www.newham.gov.uk/downloads/file/315/schoolmealevaluationreport>

from the provision of food.¹²² Instead, it attempts to maximise the number of children registered so that the FSM measure can be used for other purposes, such as attracting Pupil Premium funding to the area.

Similarly to the ECS (described above) for use by local authorities, an eligibility checker has been made available directly to parents/carers in England via London Grid for Learning.¹²³ This allows parents/carers to input their own details and check their FSM entitlement, with an immediate answer. It offers an incentive, giving them free antivirus software to go through the process regardless of whether they are eligible for FSM.

Schools can also sign up for this service, but the checker can be used by parents/carers regardless of whether their school has signed up. If eligible they will get a certificate to share with their school. Even where schools are signed up, the checking service only alerts them to the entitlement of the parent(s), and the schools then still have to complete the necessary applications for the child to receive FSM. Then, providing parents/carers have given consent for their data to continue to be held and have not opted out, schools can re-check eligibility in bulk as frequently as they want to.¹²⁴

Variation across local authorities

The evidence indicates therefore that there are variations in processes across LAs, but the extent of differences is not yet fully known. What is likely is that the different approaches across schools and LAs potentially lead to known differences in FSM registration rates. We speculate that schools/LAs that make the process more accessible or even automatic may have higher numbers of entitled children registered for FSM – though of course, local demographic factors will also interplay with this.

Additionally, the frequency with which eligibility is re-checked is also a potentially important factor for FSM registration. LAs using frequent eligibility re-checks combined with an inclusive invite to apply may maximise the number of entitled pupils who are registered. LAs that run bulk re-checks less frequently may not identify as many pupils that become eligible throughout the year, and therefore have fewer entitled children recorded with FSM. This is likely to result in a potential undercount of disadvantaged, FSM-eligible children in their schools and in the wider area.

The Department for Education's previous research into under-registration for FSM has found not only stark disparities by LA, as mentioned above, but also regional patterns: whilst only 2% of pupils entitled to FSM in the North East were not registered, according to their analyses, in the South East and East of England nearly a quarter of entitled pupils were not registered.¹²⁵

¹²² Financial Times (2023) 'The numbers behind London's free school lunch scheme.' <https://www.ft.com/content/cbcb7d44-67e6-409e-912c-157e6361f860>

¹²³ London Grid for Learning, online. 'Free School Meals Eligibility Checker FAQ.' <https://pps.lgfl.org.uk/FAQ.aspx#>

¹²⁴ LGFL. 'FSM Eligibility checker user guide.' <https://pps.lgfl.org.uk/Help/results.html>

¹²⁵ Iniesta-Martinez, S. and Evans, H (2012) 'Pupils not claiming free school meals.' https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/183380/D_FE-RR235.pdf

What has changed over time that may have systematically impacted the processes and patterns of children being recorded as FSM-eligible?

Introduction of the eligibility checking system in 2008

Prior to 2008, FSM applications required all parents/carers to submit a paper application, and proof of their entitlement (such as a letter from the Job Centre), and manual checks could potentially take many weeks.¹²⁶ In addition, parents/carers had to reapply every year, though without necessarily receiving notification of this. The introduction of the eligibility checking system enabled local authorities to check (and re-check) eligibility directly with the relevant government departments.¹²⁷

As well as removing some of the bureaucracy and effort required by parents/carers, this may have reduced potential aspects of stigma in the application process, as parents/carers only had to share minimal details for the checks to be completed (name, date of birth and national insurance number).¹²⁸

By 2011 98% of local authorities had used the service to some extent, with variation in the frequency of batch re-checks. By 2014, all local authorities were signed up to the ECS, though still the 'pattern of checks and frequency of use' is reported to have differed across authorities.¹²⁹

Case studies (with an LA, a single school and a consortium of schools) found increased uptake of FSM following the introduction of the ECS.¹³⁰ Therefore we would speculate that in the years following 2008, the ECS would have contributed to changing patterns in FSM registration. Whether it increased more or less for particular groups of families or in particular areas is something we will explore in this project's empirical analyses.

The 'economic tide'

To add complexity to interpretation, 2008 was also the year of the Global Financial Crisis, and its accompanying recession.¹³¹ As Noden (2002) warned, 'the economic tide washing in and out,' impacts the proportions of families who become FSM-entitled, and the 'effects of the economic cycle' are one force patterning tendencies in the proportions of children recorded as FSM/non-FSM

¹²⁶ Strickley, A. (2013) 'Data sharing between local and national governments for the benefit of the citizen: Online free school meals as a transformational project.' https://link.springer.com/chapter/10.1007/978-3-642-38411-0_10

Harper, C. and Wood, L. (2009) 'Please Sir? Can we have some more? - lessons from Free School Meal initiatives.' <https://www.bibsonomy.org/bibtex/c64c84e554c52eeee7c9687070d51c6f>

¹²⁷ Harper, C. and Wood, L. Ibid.

¹²⁸ Harper, C. and Wood, L. Ibid.

¹²⁹ UK Parliament (2014) 'Free School Meals: Question for Department for Education.' <https://questions-statements.parliament.uk/written-questions/detail/2014-12-01/216678>

¹³⁰ Strickley, A. (2014) 'Online Free School Meals as a Cloud-Based Solution: Three Case Studies of Its Use in England.' https://link.springer.com/chapter/10.1007/978-3-662-45770-2_27

¹³¹ ONS (2018) 'The 2008 recession 10 years on.' <https://www.ons.gov.uk/economy/grossdomesticproductgdp/articles/the2008recession10yearson/2018-04-30>

in the NPD.¹³² Similarly, the Covid years moved into eligibility many families who previously were ineligible for FSM, and more advantaged.¹³³

Again, this raises a fundamental question about what FSM actually measures, and its consistency over time. Are children from families newly eligible during the Covid period 'the same' or similar to families who became newly eligible in the years preceding this? If they are not so similar, how do their characteristics and needs, and research and policies using the FSM measure at these different points, need to vary?

Introduction of the Pupil Premium in 2011

We would speculate that the introduction of Pupil Premium in 2011 may have resulted in an increase in the number of pupils denoted as FSM-eligible. This is because it created an incentive for schools to get pupils signed up for FSM. A Department for Education report found that, since the introduction of Pupil Premium, 88% of primary schools, 84% of secondary schools, 78% of special schools and 75% of pupil referral units had encouraged families to register for FSM – though in the majority of cases, this was usual practice even before Pupil Premium was introduced.¹³⁴

It is also possible that the introduction of Pupil Premium potentially reduced the stigma for some parents/carers to apply, as invitations could now be framed in terms of helping the school get more much-needed funding. As discussed earlier, the Government encourages schools and LAs to frame the application in these terms, and: 'when encouraging families to register for FSM, most schools surveyed (80% of both primary and secondary schools) did tell parents/carers that this would increase the funding the school gets.'¹³⁵

However, the same research found some schools were reluctant to reference Pupil Premium as a way to encourage FSM registration, due to worries about the fairness of it when other children who may be classed as disadvantaged were not eligible, or because they feared pressure from parents/carers to spend the Pupil Premium funding on their own specific child(ren).¹³⁶ The nuances of pupil premium funding, usages, and messages are discussed further in Section three.

Introduction of universal infant free school meals in 2014

The introduction of universal FSM for pupils from reception to year two may have been expected to reduce the number of pupils denoted as FSM, as it removed the need for parents/carers to apply in order for their child to receive FSM in these first three years of primary school. Holford and Rabe (2020) find a decline in the number of pupils registered for FSM following the introduction of UIFSM,

¹³² Noden, P. (2002) 'Education markets and social polarisation: Back to square one?'

<https://www.tandfonline.com/doi/abs/10.1080/0267152022000031360>

¹³³ Gov.uk 'Pupil characteristics - Eligibility for FSM at any time during past 6 years' from 'Schools, pupils and their characteristics.' <https://explore-education-statistics.service.gov.uk/data-tables/permalink/7bffa7cc-95a5-4adb-fd05-08dbda004494>

¹³⁴ Carpenter, H. et al (2013) 'Evaluation of Pupil Premium Research Report.'

<https://dera.ioe.ac.uk/id/eprint/18010/1/DFE-RR282.pdf>

¹³⁵ Department for Education (2023) 'Free school meals Guidance for local authorities, maintained schools, academies and free schools.'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1133262/Free_school_meals.pdf

Carpenter, H. et al (2013) Ibid

¹³⁶ Carpenter, H. et al (2013) Ibid

and a related uptick in registration once pupils move into the older year groups, concurring with Thomson's (2018) prediction that 'some schools will be missing out on Pupil Premium funding as a result of universal infant free school meals.'¹³⁷

These findings of reduced FSM registration following the introduction of UIFSM are again confirmed by Campbell and Obolenskaya (2021), who analysed trends in poverty alongside trends in FSM registration, finding that after the introduction of UIFSM the poverty rate for 4/5-year-olds increased, while the proportion of reception children registered as FSM decreased. This provides further evidence that the decline in registration at this stage is due in part to the UIFSM policy, rather than a reduction in the need for FSM amongst this age group. The authors also find a rise of nearly 10 percentage points in children newly registered as FSM at Year 3 (when they are no longer entitled to universal FSM).¹³⁸

Still, the decline in registration following the introduction of UIFSM was perhaps not as great as expected. Since 2015, pupils starting school and thereby eligible for UIFSM had FSM registration rates 1.2 percentage points lower compared to those starting school before the policy was introduced.¹³⁹ This could be because schools and LAs anticipated a decline in FSM applications, and therefore made more effort to encourage entitled parents/carers to apply to counteract this – or it could be because, as demonstrated by the example of Newham, above, recording pupils as being FSM-eligible was already largely decoupled from provision of meals in schools even nearly a decade ago.

As noted in Campbell and Obolenskaya (2021), there are numerous arguments for the introduction and continuation of UIFSM, and indeed Holford and Rabe's (2000) evaluation finds positive impacts of the initiative.¹⁴⁰ Our consideration of the impacts of UIFSM on children's registration and FSM status within the NPD in no way impacts the wider case for the universal provision of meals.

Introduction of universal free school meals for all primary children

As highlighted earlier, several LAs have implemented a policy of universal provision of meals for all primary children for some years, and the exact details of this (and how it may relate to registrations and FSM status in the NPD at the local level) are something we hope to map in our forthcoming empirical strand.

Additionally, the Mayor of London's decision to provide universal FSM to all primary schools in London in 2023 may have a dampening effect on FSM registration, like the introduction of UIFSM. However, we might expect schools and LAs in London to be implementing strategies to mitigate against this potential impact, so whether there is any comparative fall in the London area that may be attributed to this policy remains to be seen. Perhaps there will be little impact, given indications

¹³⁷ Thomson, D. (2018) 'How much Pupil Premium funding are primary schools missing out on?' <https://ffteducationdatalab.org.uk/2018/12/how-much-pupil-premium-funding-are-primary-schools-missing-out-on/>

Holford, A. and Rabe, B. (2020) 'Impact of the universal infant free school meals policy.' https://www.iser.essex.ac.uk/wp-content/uploads/files/misoc/reports/Impact_of_the_Universal_Infant_Free_School_Meal_policy.pdf

¹³⁸ Campbell and Obolenskaya (2021) 'No such thing as a free lunch?' <https://sticerd.lse.ac.uk/dps/case/cp/casepaper225.pdf>

¹³⁹ Holford, A. and Rabe, B. (2020) Ibid.

¹⁴⁰ Campbell and Obolenskaya (2021) Ibid.

that at least some London boroughs already have comprehensive systems in place to identify FSM-entitled pupils.

In summary: Sections one and two

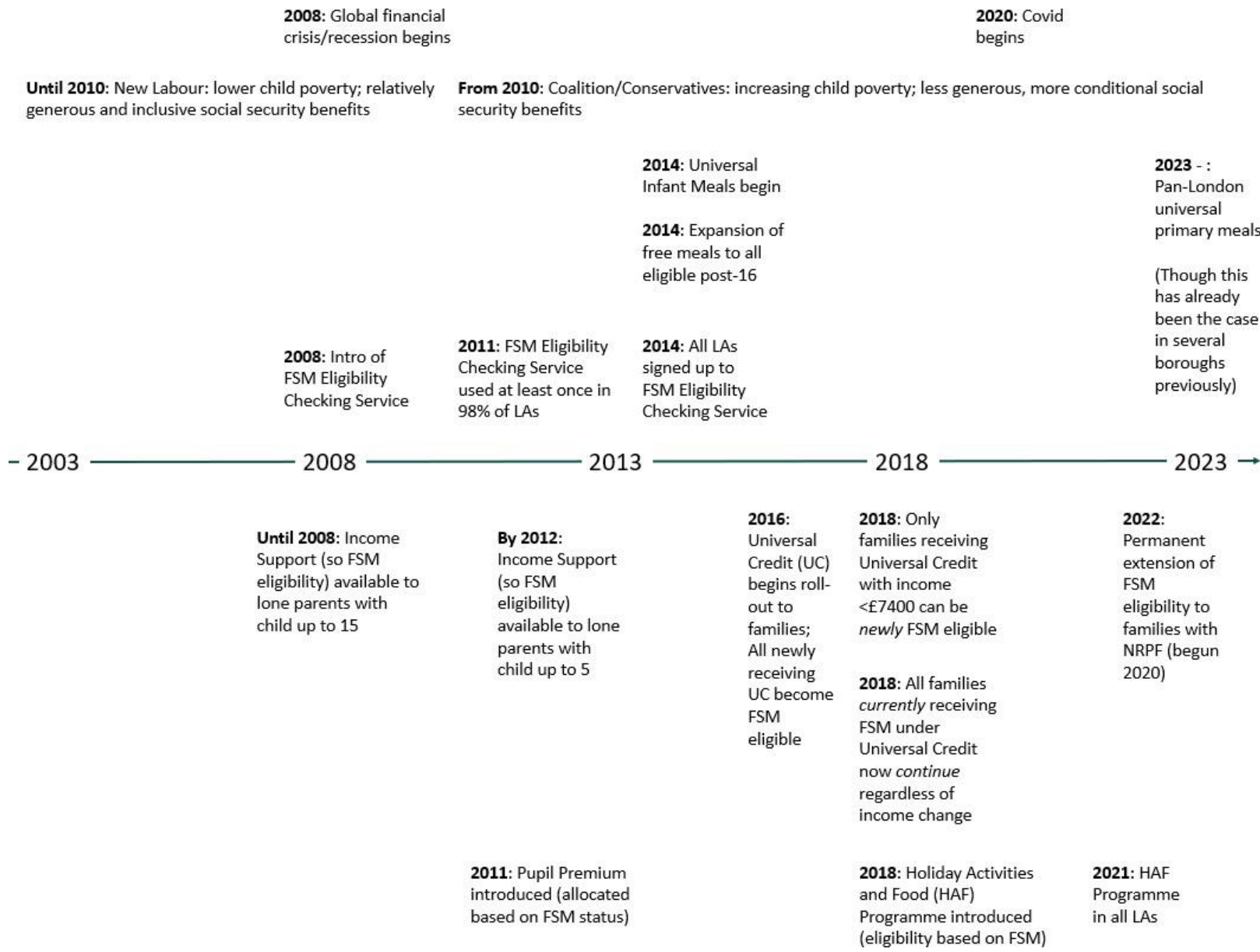
In summary, Sections one and two have outlined a number of factors and processes that underpin the construction of the FSM measure in the National Pupil Database, and that may provide some explanations for the variations by time and place that will be explored during subsequent strands of this project. They also highlight remaining unknowns in terms of local processes, and changes to the ways that children have been attributed as FSM-eligible over time. These unknowns will be investigated during our empirical work.

Figure 3 summarises key changes over time that may have impacted the composition of the groups of children recorded as FSM and non-FSM in the NPD, and the different levels and mechanisms through which they play out.

Additionally, the evidence discussed here begins to suggest that, over the years, the processes for identifying children as ‘Free School Meal-eligible’ have increasingly dissociated from the processes of and decisions in terms of providing actual Free School Meals. Assumptions around this and implications for clarity in narratives, definitions, and policymaking will be explored further over the course of the project.

Lastly, the evidence discussed throughout the preceding sections highlights a number of characteristics and family circumstances that may have changed over the past two decades in the underlying composition of the FSM/non-FSM groups, including family composition – particularly the prevalence of lone-parent families in the FSM group. The empirical strands of this research will explore whether this has been the case.

Figure 3: Timeline of selected changes to policies and wider context, that may have impacted which children are recorded as FSM/non-FSM in the NPD over the past two decades



Section three: Uses of FSM and Pupil Premium in practice and policymaking – intended and unintended consequences, and broader issues

Section one of this report touched upon the various ways in which the FSM measure is used in resource allocation and funding distribution by central government, local authorities and schools. This section returns to focus in more detail on some of the nuances and outcomes of the uses of FSM in practice and policymaking.

FSM and Pupil premium as a tool for targeting pupils within schools

At the level most proximal to the pupil, denotation as FSM-eligible, or ascription as Pupil Premium (based on being recorded FSM-eligible at some point over the past six years), guides schools' targeting of and focus on certain children.¹⁴¹ This is not the only metric according to which individuals are delineated – for example, being recorded with Special Educational Needs and/or Disabilities also confers theoretical resources – and practices will vary. However, particularly through its direct and centrally prescribed use in deciding which pupils are to be denoted as Pupil Premium, FSM has a prominent role.¹⁴²

One key issue with the use of FSM and Pupil Premium to identify individual pupils within schools is that the mean average tendency in large-scale data for children recorded FSM to attain lower levels is extrapolated downwards to every child. This ignores both individual differences and variation within the FSM group (and the non-FSM-ascribed group) and the imperfection of the measure in capturing all children who may be less resourced or advantaged than their peers. Issues with and implications of generalising from the group to the individual are touched upon further in Section four.

Research has suggested dissatisfaction from some teachers around requirements to prioritise according to FSM/Pupil Premium, because staff do not always perceive the pupils identified through this metric as those most in need of extra support.¹⁴³ Heads are reported as describing resulting, 'ethical dilemmas...where pupils in greater need are excluded from clubs or provision.'¹⁴⁴

¹⁴¹ Sutton Trust (2015) 'The Pupil Premium: Next steps.' <https://www.suttontrust.com/wp-content/uploads/2019/12/Pupil-Premium-Summit-Report-FINAL-EDIT-1.pdf>
Education Endowment Foundation. 'Closing the attainment gap.' <https://educationendowmentfoundation.org.uk/support-for-schools/bitesize-support/closing-the-attainment-gap>

¹⁴² Roberts (2023) 'The pupil premium (England).' <https://researchbriefings.files.parliament.uk/documents/SN06700/SN06700.pdf>

¹⁴³ Riordan, S. and Jopling, M. (2021) 'Against the Odds: Why expecting schools to overcome disadvantage is doomed to failure.' (<https://sticerd.lse.ac.uk/dps/seminarpapers/ses19052021.pdf>)

¹⁴⁴ Allen, B. (2018) 'The pupil premium is not working (part II): Reporting requirements drive short-term, interventionist behaviour.' <https://rebeccaallen.co.uk/2018/09/11/the-pupil-premium-is-not-working-part-ii/>

Research has also indicated feelings of stigmatisation and ‘humiliation’ among pupils at the public knowledge and associated practices within schools according to their status.¹⁴⁵ Making salient an assumed characteristic and group membership, when the group is presumed to be lesser, or deficient, or needy, can have unintended consequences for the treatment of pupils (this of course is not unique to denotation through the FSM measure). These consequences are illustrated both by large-scale quantitative studies and by in-depth qualitative research. Burgess and Greaves’s (2009) analyses of the NPD, for example, find stereotyping and under-rating in national teacher key stage assessments of children recorded as FSM.¹⁴⁶ After conducting detailed case studies, Bradbury (2011) highlighted that, ‘it is important to recognise that concerns...over the lower attainment of children...on FSM also have an impact on expectations, and on the discourses that operate in schools.’¹⁴⁷

As Riordan and Jopling (2021) correspondingly suggest, following mixed methods research on the Pupil Premium for the Social Mobility Commission: ‘The way disadvantage is identified in schools leads all too easily to stigmatisation and exclusion.’¹⁴⁸ These components of ‘being FSM / Pupil Premium’ will be explored further during our empirical strands.

To some extent, these aspects of the uses and penalties of the FSM measure may well be unintended consequences of well-intended policies – and they are not the only outcomes of the policies. Nuances in terms of Pupil Premium implementation and continuation are discussed further below.

FSM status as a tool for monitoring school performance and the performance of the education system and policies

FSM has long been used in the Department for Education’s performance measures, in order to attempt to hold schools and local authorities accountable for the attainment of the children they educate.¹⁴⁹ Conditioning analyses of attainment or progress on the proportion of children recorded FSM/Pupil Premium in a school hopes to allow a fairer comparison than raw differences, controlling for the levels of existing/external disadvantage experienced by children outside of the school setting.

There are numerous challenges regarding the extent to which this plays out as intended. For example, as highlighted in Sections one and two, there may be local and group-level variations in sign-up for qualifying benefits and then as free school meals-eligible, which lend error, undercount, and systematic bias to the measures.

Research by Dearden et al (2011), discussed further in Section four, shows that a key and directly relevant determinant of children’s educational attainment – their mothers’ education – is not sufficiently proxied by FSM. In the past, this led ‘the DfE to erroneously overpenalise low-achieving

¹⁴⁵ Riordan, S. and Jopling, M. Ibid.

¹⁴⁶ Burgess, S. and Greaves, E. (2009) ‘Test Scores, Subjective Assessment and Stereotyping of Ethnic Minorities.’ <https://www.bristol.ac.uk/media-library/sites/cmpo/migrated/documents/wp221.pdf>

¹⁴⁷ Bradbury, A. (2011) ‘Rethinking assessment and inequality: the production of disparities in attainment in early years education.’ http://mmiweb.org.uk/scitts/tutors/downloads/4_Assignment_2/assessment_lit_gen/%20Bradbury_2011_EYA_ss.pdf

¹⁴⁸ Riordan, S. and Jopling, M. Ibid.

¹⁴⁹ Gov.uk (2016) ‘Understanding school and college performance measures.’ <https://www.gov.uk/government/publications/understanding-school-and-college-performance-measures>

schools that have a greater proportion of mothers with low qualifications and to over-reward high-achieving schools that have a greater proportion of mothers with higher qualifications.’¹⁵⁰ Morris et al (2018) agree that value-added and progress-based measures, even controlling for FSM and other factors recorded in the NPD, do not adequately account for differences between pupils that are beyond the influence of the school. They argue that their research suggests: ‘value-added measures reflect genetic differences between students and may misattribute pre-existing differences in pupil ability to school and teacher performance, leading to biased school league tables.’¹⁵¹

In terms of differences among local authorities in attainment ‘gaps’ between FSM/non-FSM and Pupil Premium/non-Pupil Premium children, the same issues apply. Gorard and colleagues’ research - discussed further in Section four – highlights how attempts to create a more inclusive and stable measure of disadvantage through the Pupil Premium criteria (with children ‘ever FSM’ over the past six years denoted Pupil Premium) introduces its own issues with comparability and consistency, impacting fairness and accuracy in monitoring and accountability.

Gorard et al (2021) highlight how – notwithstanding issues with variation in registration – local authorities containing children who are recorded as FSM during many years of schooling are potentially operating in a more disadvantaged context than those whose pupils are occasionally recorded FSM. On the Pupil Premium measure, all these pupils will be recorded as equivalent, regardless of number of times FSM. Consequently, ‘it is clear that local authorities in England with high attainment gaps have fewer EverFSM6 pupils who have only been eligible for one year in their school (and proportionately more long-term FSM-eligible pupils).’¹⁵² Potential alternatives to ‘EverFSM6’ are discussed in Section five of this report.

FSM as a proxy for ‘working class,’ and other socio-economic categorisations

Both in research and in policymaking FSM has been used as an assumed proxy for social class/‘working class,’ family (low) income, poverty, deprivation, and disadvantage.¹⁵³ It has also been used more vaguely as a control, assumed, for example, to account for error in statistical models, with various degrees of certainty and specificity regarding what the error may consist of.¹⁵⁴

¹⁵⁰ Dearden, L. et al (2011) ‘Measuring school value-added with administrative data: the problem of missing variables.’ <https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1475-5890.2011.00136.x>

¹⁵¹ Morris, T. et al (2018) ‘Measures of school performance are biased by genetic differences between students.’ https://www.bristol.ac.uk/media-library/sites/policybristol/PolicyBristol_Briefing_61_Sept_2018_genetics_school_performance_measures.pdf

¹⁵² Gorard, S. et al (2019) ‘The difficulties of judging what difference the Pupil Premium has made to school intakes and outcomes in England.’ <https://www.tandfonline.com/doi/full/10.1080/02671522.2019.1677759>

¹⁵³ See e.g. Halse, J. and Ledger, A. (2007) ‘The use of free school meal status as a proxy for socioeconomic status.’ https://nces.ed.gov/FCSM/pdf/2007FCSM_Halse.VI-C.pdf

Stokes, L. et al (2015) ‘A compendium of evidence on ethnic minority resilience to the effects of deprivation on attainment.’ <https://socialwelfare.bl.uk/artifacts/4156215/a-compendium-of-evidence-on-ethnic-minority-resilience-to-the-effects-of-deprivation-on-attainment/4965076/>

Ilie, S. et al (2017) ‘Revisiting free school meal eligibility as a proxy for pupil socio-economic deprivation.’ <https://bera-journals.onlinelibrary.wiley.com/doi/abs/10.1002/berj.3260>

¹⁵⁴ Hobbs, G. (2007) ‘Investigating social class inequalities in educational attainment : The effects of schools and the validity of free school meal status as a proxy for socio-economic status.’ <https://discovery.ucl.ac.uk/id/eprint/10020538/>

Much of the exploration into the extent to which these are valid uses has originated with researchers concerned with interrogating the measure alongside their own utilisation of it. This includes the current project and the studies discussed in Section four.

Use of the FSM measure in policymaking by successive governments has ostensibly taken a less self-critical slant. Exceptions to this exist, but they do not appear to have yet gained traction beyond short-term projects and the analytical community – because FSM continues to be used as it ever was.¹⁵⁵ In 2017, for example, Department for Education analysts produced a working document detailing experimental linking of HMRC data on income with measures of FSM and Pupil Premium in the NPD.¹⁵⁶ Like other work, this showed a clear gradient between income and pupil attainment, and that FSM does not proxy this detailed gradient. However, results and recommendations from the consultation that accompanied this exercise were not published for five years. In 2022, a brief statement appeared:

The Department for Education sought views on the development of a methodology which intended to improve our ability to understand the links between family circumstances and education of pupils in England...

We have developed a Business-As-Usual dataset called Pupil Parent Matched Data (PPMD) which is still at a relatively early stage of development and includes further revisions to strengthen the proposed methodology.¹⁵⁷

To date, there are no further public indications from the Department regarding when this dataset may begin to be used, or what is contained within it.

Meanwhile, FSM is often used multifariously within the same government publication to skip between representing different concepts, without settling upon one. This is important because understanding policy problems and devising policy solutions depend on the actual concept or concrete experience that FSM is being assumed to proxy and children are being assumed to experience. Solutions and interventions based on an understanding that pupils are experiencing poverty or material deprivation will be different to solutions and interventions assuming the key factor delineating children from one another is their social class and associated cultural background and norms.

¹⁵⁵ Sutherland, A. et al (2015) 'Factors associated with achievement: key stage 2.'

[https://assets.publishing.service.gov.uk/media/5a74fe2540f0b6399b2afcf7/RR486 - Factors associated with achievement - key stage 2.pdf](https://assets.publishing.service.gov.uk/media/5a74fe2540f0b6399b2afcf7/RR486_-_Factors_associated_with_achievement_-_key_stage_2.pdf)

Sutherland, A. et al (2015) 'Factors associated with achievement: key stage 4.'

[https://assets.publishing.service.gov.uk/media/5a7f519aed915d74e6229bc8/RB407 - Factors associated with achievement - key stage 4 brief.pdf](https://assets.publishing.service.gov.uk/media/5a7f519aed915d74e6229bc8/RB407_-_Factors_associated_with_achievement_-_key_stage_4_brief.pdf)

¹⁵⁶ Department for Education (2017) 'Analysing family circumstances and education.'

https://consult.education.gov.uk/school-leadership-analysis-unit/analysing-family-circumstances-and-education-1/supporting_documents/Analysing%20family%20circumstances%20technical%20consultation%20document.pdf

¹⁵⁷ Department for Education (2022) 'Analysing family circumstances and education: Feedback updated 7 September 2022.' <https://consult.education.gov.uk/school-leadership-analysis-unit/analysing-family-circumstances-and-education-1/>

For example, an evidence review published by the Department for Education into the relatively lower attainment of pupils recorded in the NPD as White British and FSM-eligible introduces itself as follows:

This report reviews the existing evidence on educational attainment among disadvantaged pupils from different ethnic groups. It explores why pupils in some ethnic groups appear to be more resilient to the pressures of poverty on educational attainment, as well as why disadvantaged pupils from some ethnic groups have seen a greater improvement in attainment compared with White working class pupils.¹⁵⁸

Here we can see that all pupils are described as ‘disadvantaged’ – which is non-specific – but that some ethnic groups recorded as FSM are described as experiencing ‘poverty.’ In contrast, White FSM-recorded pupils are described as ‘working class.’

This is by no means unique to this particular report – for years, children, particularly White children, denoted FSM-eligible have been referred to in government and parliamentary discourse as ‘working class’ – for example, in the Education Select Committee’s (2014) enquiry, ‘Underachievement in Education by White Working Class Children,’ which ‘focused on pupils who are eligible for free school meals.’¹⁵⁹

This was reprised in 2021 with the Education Select Committee’s: ‘The forgotten: how White working-class pupils have been let down, and how to change it.’¹⁶⁰ The committee’s conclusions very specifically centre poverty as a causal factor influencing the attainment of pupils recorded as White and FSM: ‘Never again should we lazily put the gap down to poverty.’¹⁶¹

Aside from this appearing to contradict the evidence on causal links between poverty and children’s outcomes, the most obvious issue here is that ‘working class’ (and other definitions and delineators of ‘class’) does not, by any definition or report, overlap neatly with FSM eligibility or registration – yet differences between FSM and non-FSM pupils in the NPD are what underpin the problem set out to be tackled by these inquiries.¹⁶² This is discussed further in Section four. Gilbourne (2021) comments:

So what’s wrong with a focus on white working-class pupils? First, ‘working-class’ children are not the same as those on free school meals. The latest report – as well as almost every headline on this topic over the past decade – has reported data on this group of children in poverty under the banner ‘working class.’ This makes for impressive soundbites, but it

¹⁵⁸ Stokes, L. et al (2015) ‘A compendium of evidence on ethnic minority resilience to the effects of deprivation on attainment.’ <https://socialwelfare.bl.uk/artifacts/4156215/a-compendium-of-evidence-on-ethnic-minority-resilience-to-the-effects-of-deprivation-on-attainment/4965076/>

¹⁵⁹ Parliament.uk. (2014) ‘Underachievement in Education by White Working Class Children.’ <https://committees.parliament.uk/work/2270/underachievement-in-education-by-white-working-class-children/publications/>
<https://publications.parliament.uk/pa/cm201415/cmselect/cmeduc/142/142.pdf>

¹⁶⁰ Parliament.uk (2021) ‘The forgotten: how White working-class pupils have been let down, and how to change it’ <https://publications.parliament.uk/pa/cm5802/cmselect/cmeduc/85/8502.htm>
<https://committees.parliament.uk/committee/203/education-committee/news/156024/forgotten-white-workingclass-pupils-let-down-by-decades-of-neglect-mps-say/>

¹⁶¹ Parliament.uk (2021). Ibid.

¹⁶² Cooper and Stewart (2017) ‘Does Money Affect Children’s Outcomes? An update.’ <https://sticerd.lse.ac.uk/dps/case/cp/casepaper203.pdf>

grossly misrepresents the scale of the issue. In Britain around 60% of adults think of themselves as working class; but free school meals kids make up only around 15% of white pupils in state schools. Simply by replacing 'FSM' with 'working class', the MPs' report exaggerates the size of the issue by a factor of four. Not only that, it makes 60% of adults feel that their children are being held back unfairly.¹⁶³

The question, if Gillbourne is correct in his assessment, is who, or what, parents who identify themselves as being 'working class' perceive their children as being held back by. The optics and perceptions of the use of the FSM measure and the highly publicised Pupil Premium policy are discussed further below.

FSM and Pupil Premium as key topline public measures for spending and funding 'prioritisation'

The Pupil Premium is separate from the main source of schools funding, the Dedicated Schools Grant.¹⁶⁴ Individual children attract Pupil Premium if they have ever been recorded through the Schools Census (incorporated in the NPD) as FSM-eligible in the last six years (a small proportion of children are also eligible under other criteria). There is no gradation of the funding rate according to number of times recorded (which brings its own issues, as flagged by Gorard [2021]).¹⁶⁵ Schools are allocated the extra Pupil Premium funding for each and any child who meets this 'Ever 6' criteria. There is no variation in the amount of funding according to area or any other factor.¹⁶⁶

Though the measure of whether children are recorded FSM in the NPD is the necessary component of Pupil Premium allocation based on deprivation, Pupil Premium is not the only part of the overall schools funding distribution that is determined by FSM.¹⁶⁷ Numbers of children eligible for FSM in the past six years (the same criteria used for Pupil Premium) is also factored into the National Funding Formula schools block, and FSM eligibility is a factor in the High Needs block of funding. Area-level deprivation (IDACI; the proportion of children living in low-income families) is included as a factor as well.¹⁶⁸

Until 2021, Pupil Premium eligibility was determined according to information on FSM status recorded in the January Schools Census, at which point most children have been attending their school within their current year group for over a term. From 2021, the October Schools Census (taken shortly after the beginning of the school year) has been used instead. This in itself has caused

¹⁶³ Gillbourne, D. (2021) 'How white working-class underachievement has been used to demonise antiracism.' <https://www.theguardian.com/commentisfree/2021/jun/23/how-white-working-class-underachievement-has-been-used-to-demonise-antiracism>

¹⁶⁴ Robers, N. (2023) 'The Pupil Premium (England).' <https://commonslibrary.parliament.uk/research-briefings/sn06700/>

¹⁶⁵ Gorard, S et al (2019) 'The difficulties of judging what difference the Pupil Premium has made to school intakes and outcomes in England.' <https://www.tandfonline.com/doi/full/10.1080/02671522.2019.1677759>

¹⁶⁶ Robers, N. (2023) 'The Pupil Premium (England).' <https://commonslibrary.parliament.uk/research-briefings/sn06700/>

¹⁶⁷ Perera, N. and Andrews, J. (2020) 'School funding and the disadvantage gap at the local level.' https://epi.org.uk/wp-content/uploads/2021/03/School_funding_CRED_EPI.pdf

¹⁶⁸ Ogden, K. et al (2022) 'Does funding follow need? An analysis of the geographic distribution of public spending in England.' <https://ifs.org.uk/publications/does-funding-follow-need-analysis-geographic-distribution-public-spending-england>

a downward shift in the proportions of pupils allocated, and therefore, alongside other factors, may impact comparability between cohorts and over time.¹⁶⁹

The Department for Education chose recorded FSM eligibility as the basis for determining Pupil Premium, and therefore for channelling targeted funding to schools serving pupils with fewer resources and higher levels of poverty and deprivation, on the basis that:

[A]llocating funding on the basis of FSM eligibility, as recorded on the pupil-level annual school census, has the very substantial benefit that it reflects the specific characteristics of the individual pupil. It is easily collected and is updated annually.¹⁷⁰

As noted throughout this report, there are various challenges to this, including bias, undercount and error introduced by non-sign-up for FSM, which may vary by pupil, group, and area characteristics. There are also dependencies between the individual and their context which mean that being registered as FSM does not stem entirely from the volition and entitlement of the individual family. Funding fairly on this basis assumes completeness, accuracy, and lack of bias in the information at individual pupil-level.

Aside from distributional discrepancies at the school or local level, at the national level, Figure 4 begs the question: have levels of funding allocated through Pupil Premium in fact reflected national levels of poverty and deprivation experienced by children in England since its introduction?

Figure 4 shows a fall in the percentage of children allocated Pupil Premium Funding on the basis of 'Deprivation' (FSM status over the past six years) from 2013/14 to 2019/20. There is an uptick after this point, during the Covid era. Were Pupil Premium an accurate reflection of levels of poverty and deprivation among pupils in England, this would indicate rising fortunes and lesser need for supplementary funding for under-resourced children and their schools over the 2010s.

Yet statistics on child poverty over the same period tell a different story. Levels of poverty among households with children were rising, at least according to some measures, within the same period.¹⁷¹ Vizard et al report:

...analysis shows [a] slowdown, stalling and reversal of progress in reducing child poverty during the second decade of the 21st century [that] impacted on children from many different social groups. However, it is of particular concern that some of the groups that were already the most disadvantaged at the beginning of the 2010s were disproportionately impacted with further increases in their child poverty risks and a widening of prevalence gaps with more advantaged comparator groups.¹⁷²

This suggests that the various factors impacting entitlement to and registration for FSM, and consequentially denotation as Pupil Premium, have resulted in an increasing dissociation of FSM/Pupil Premium from underlying disadvantage over this era. This may be particularly

¹⁶⁹ Robers, N. (2023) Ibid

¹⁷⁰ Department for Education (2011) 'Consultation on school funding 2011-12: Introducing a pupil premium.' <https://dera.ioe.ac.uk/id/eprint/3865/1/School%20Funding%20Consultation%20Document.pdf>

¹⁷¹ Child Poverty Action Group (2023) 'The cost of child poverty in 2023.' https://cpag.org.uk/sites/default/files/files/policypost/Cost_of_child_poverty_2023.pdf

¹⁷² Vizard, P. et al (2023) 'Going backwards? The slowdown, stalling and reversal of progress in reducing child poverty.' <https://sticerd.lse.ac.uk/dps/case/spdo/spdorp14.pdf>

pronounced for multiply-marginalised or disadvantaged groups. Both in terms of FSM as a measure for use as though stable and consistent in research and policymaking, and for funding allocation, this is highly problematic. Teachers' reports of 'ethical dilemmas...where pupils in greater need are excluded' because they are not recorded as FSM/Pupil Premium chime with these patterns in the national data.¹⁷³

Figure 4: Percent pupils allocated the Deprivation Pupil Premium funding, 2013/14 – 2022/23: all of England, and by region; primary school pupil and secondary school pupils



Source: Department for Education, Pupil premium Allocations: various years. Figures are specifically the percentage of pupils allocated the deprivation pupil premium (according to FSM status), excluding Pupil Premium allocated according to other criteria

¹⁷³ Allen, B. (2018) 'The pupil premium is not working (part II): Reporting requirements drive short-term, interventionist behaviour. <https://rebeccaallen.co.uk/2018/09/11/the-pupil-premium-is-not-working-part-ii/>

The function of Pupil Premium within the wider context of schools funding is also relevant here. As Sibieta (2022) reports, 'Between 2009–10 and 2019–20, spending per pupil in England fell by 9% in real terms.'¹⁷⁴ The latest figures from the Department for Education indicate that funding channelled through the Pupil Premium is 2.9 billion of a total of 57.3 billion – 5% of the overall total.¹⁷⁵ Pupil Premium is provided directly to the school in which an allocated pupil is educated, with no top-slicing nor other mediation.¹⁷⁶ In contrast, relative amounts of funding via the schools block can be distorted by other factors such as minimum funding levels, minimum year-on-year increases in per pupil funding, and the application of local funding formula.¹⁷⁷ So while this funding may be a relatively small proportion of the whole, it is guaranteed to a school on the basis of pupils' recorded FSM. However, as it is not ringfenced for spending on the individual pupil, what this means in terms of inputs for the child denoted FSM/Pupil Premium varies.

Particularly within the wider context of falling resourcing overall, Pupil Premium funding may not be reaching its intended individual recipients. The National Audit Office reported that by 2015, 'real-terms reductions in school funding mean the Pupil Premium has not always increased school budgets,' and that 'Some schools with very disadvantaged intakes have less money per pupil now, in real terms, than in 2010, despite the extra funding provided by the Pupil Premium.'¹⁷⁸

As a consequence, as reported by The National Governance Association (2018), 'Many schools fund initiatives through the pupil premium which should generally come out of the school budget.'¹⁷⁹ A 2019 report of the Education Select Committee agreed, reporting: 'widespread acknowledgement that Pupil Premium funding was being used to plug holes in school budgets, rather than being directed towards disadvantaged pupils.' The Committee also concluded: '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'¹⁸⁰

But the intention of the Pupil Premium policy is not only to redistribute funding according to need. It is to identify, make visible, and prioritise particular children for intervention and support. Despite the positive progressive intentions underpinning this policy, potential unintended negative consequences of the strategy, within schools, were discussed earlier in this chapter. Once more, the question of whether the 'right' children are being identified, given the incompleteness and error in

¹⁷⁴Sibieta, L. (2022) 'School spending and costs: the coming crunch.' <https://ifs.org.uk/publications/school-spending-and-costs-coming-crunch>

¹⁷⁵ Andrews, J. et al (2023) 'Education priorities in the next general election.' <https://epi.org.uk/wp-content/uploads/2023/07/EducationPrioritiesInTheNextGeneralElectionDigital.pdf>

¹⁷⁶ Gov.uk (2023) 'Schools block funding formulae 2023 to 2024: Analysis of local authorities' schools block funding formulae.' <https://www.gov.uk/government/publications/schools-block-funding-formulae-2023-to-2024/schools-block-funding-formulae-2023-to-2024-analysis-of-local-authorities-schools-block-funding-formulae#deprivation>

¹⁷⁷ Gov.uk (2023) Ibid

¹⁷⁸ National Audit Office (2015) 'Funding for disadvantaged pupils.' <https://www.nao.org.uk/wp-content/uploads/2015/06/Funding-for-disadvantaged-pupils-summary.pdf>

¹⁷⁹ National Governance Association (2018) 'Spotlight on disadvantage: pupil premium research.' <https://www.nga.org.uk/knowledge-centre/spotlight-disadvantage-pupil-premium-research/#:~:text=Research%20overview&text=This%20revealed%20that%20governing%20boards,and%20evaluate%20the%20pupil%20premium.>

¹⁸⁰ House of Commons Education Committee (2018) 'A ten-year plan for school and college funding.' <https://publications.parliament.uk/pa/cm201719/cmselect/cmeduc/969/969.pdf>

the FSM measure is raised. Notwithstanding this, evidence consistently suggests that the Pupil Premium policy has resulted, as intended, in multiple shifts in practice within schools.

The National Governance Association (2018) reports, 'governing boards often know their pupil premium pupils well, are heavily involved in championing the needs of pupil premium pupils and work closely with senior leaders to decide how to spend, monitor and evaluate the pupil premium.' The National Audit Office (2015) concluded, 'The Department has...created a strong drive to improve support for disadvantaged pupils by targeting the Pupil Premium at schools on a rational basis; clearly communicating the funding's objective; investing in research and sharing best practice.'¹⁸¹

The Pupil Premium policy was also intended to incentivise schools to prioritise under-resourced/disadvantaged children in admissions: Roberts (2023) describes how in 2014, the Schools Admissions Code was changed to allow schools 'the option to prioritise disadvantaged children' (as identified through Pupil Premium eligibility) in applications to enter the school.'¹⁸² Gorard et al (2022) have argued that there has been some consequential impact on lessening segregation, but Burgess et al (2023) find that, 'despite explicit financial incentives, only a small minority of schools give priority to pupils eligible for the Pupil Premium, and this priority is meaningful only in a few dozen schools.'¹⁸³ The net impact on school composition, admissions, and mixing is as yet unclear.

So there are suggestions of various potential issues with the ways that Pupil Premium policy is playing out under the current government, including misallocation due to inaccuracies in FSM's capacity to proxy disadvantage and identify children, and unintended consequences of denoting certain children as deficient and visibly marginalised within schools. There is also a lack of evidence and consensus on consistent impacts of the Pupil Premium on attainment or other pupil experiences.¹⁸⁴ However, there can still be seen to be a clear, genuinely positive intention behind the policy – at least at its conception – and its use of recorded FSM eligibility to prioritise those who may benefit from extra support.¹⁸⁵

Nevertheless, a last, more nuanced point, regarding the wider workings of government and policy narratives should also be noted. The Department for Education, under the latest government, continues as detailed above to channel a small proportion of funding directly through the Pupil Premium. It continues to publicise and make visible this channelling, emphasise it through monitoring and accountability mechanisms, and hold schools accountable for its impacts.¹⁸⁶ Some have argued that, as there is no requirement to ringfence the Pupil Premium for the individual pupil who attracts it, and given that the Department and its agencies stipulate that the best use of the funding is to 'prioritise high-quality teaching,' which will benefit all pupils, 'then surely we should

¹⁸¹ National Audit Office (2015) 'Funding for disadvantaged pupils.' <https://www.nao.org.uk/wp-content/uploads/2015/06/Funding-for-disadvantaged-pupils-summary.pdf>

¹⁸² Roberts, N. (2023) 'The Pupil Premium (England).' <https://commonslibrary.parliament.uk/research-briefings/sn06700/>

¹⁸³ Gorard, S. (2022) 'Assessing the impact of Pupil Premium funding on primary school segregation and attainment.' <https://www.tandfonline.com/doi/full/10.1080/02671522.2021.1907775>

Burgess, S. et al (2023) 'School admissions in England.' <https://bristol.ac.uk/media-library/sites/economics/documents/admissioncriteria.pdf>

¹⁸⁴ Roberts, N. (2023) Ibid

¹⁸⁵ Gov.uk (2010) 'Government announces pupil premium to raise achievement.' <https://www.gov.uk/government/news/government-announces-pupil-premium-to-raise-achievement>

¹⁸⁶ Gov.uk 'Guidance: Pupil premium.' <https://www.gov.uk/government/publications/pupil-premium>

just roll it into the general schools funding formula with all the other money [for] schools serving disadvantaged communities' (Allen, 2018).¹⁸⁷

At the Conservative Party Conference (2023), the Prime Minister announced, 'Education is the closest thing we have to a silver bullet – it is the best economic policy, the best social policy and the best moral policy.'¹⁸⁸ Leaving aside obvious questions this raises regarding the justification for a real-terms drop in schools funding under this government, discussed above, the continuation of the Pupil Premium may serve functionally to signal a prioritisation of disadvantaged children solely through education; to convey that this is a sufficient and efficient way to tackle disadvantage. Its continuation has been accompanied by an explicit de-prioritisation of poverty in policymaking, despite opinion and expertise advising against such an approach.¹⁸⁹

But as Kaye (2021) argues:

...the persistence of socioeconomic attainment gaps represents a social policy issue, with governments overlooking the root cause of educational inequalities by focusing on school based interventions and shrinking away from addressing the pervasive structural inequalities throughout society.¹⁹⁰

Vignoles (2023) agrees:

...what we see in the classroom...reflects what's happening in the wider economy...It's impossible to separate [the two]... All this should concern us. The reason why it should concern us is that it's reflecting what's going on outside in the wider world.¹⁹¹

At best, this extreme focus of government on intervention at the school-level may be ineffective and ill-informed. This is particularly in light of the inaccuracy and uncertainty of FSM and Pupil Premium in targeting disadvantaged pupils, highlighted throughout this report, and the lack of evidence for impact of the targeting of funding and attention on these pupils, in the context of surrounding political and social policy changes. It also sidelines the consistent evidence from research that poverty and low-income causally depress children's trajectories, and the fact that just 10-20% of differences in children's outcomes are attributable to schools – the rest to 'multiple "social determinants" – family income and wealth; physical and mental health; housing and neighbourhood conditions and so on.'¹⁹²

¹⁸⁷ Allen, B. (2018) 'The pupil premium is not working (part II): Reporting requirements drive short-term, interventionist behaviour. <https://rebeccaallen.co.uk/2018/09/11/the-pupil-premium-is-not-working-part-ii/>

¹⁸⁸ Gov.uk (2023) 'New qualifications to deliver world class education for all.'

<https://www.gov.uk/government/news/new-qualifications-to-deliver-world-class-education-for-all>

¹⁸⁹ Stewart, K. (2019) 'Child Poverty Measurement in the UK: Assessing Support for the Downgrading of Income-Based Poverty Measures.' <https://link.springer.com/article/10.1007/s11205-018-1880-9>

¹⁹⁰ Kaye, N. (2023) 'The cumulative impact of socioeconomic disadvantage on educational attainment during austerity.' <https://www.tandfonline.com/doi/full/10.1080/03054985.2023.2234287#>

¹⁹¹ BERA (2023) 'In Conversation with... Anna Vignoles: Improving the educational outcomes of poor students: a tale of contradictions.' <https://www.bera.ac.uk/media/bera-agm-2023-in-conversation-with-anna-vignoles>

¹⁹² Cooper and Stewart (2017) 'Does Money Affect Children's Outcomes? An update.'

<https://sticerd.lse.ac.uk/dps/case/cp/casepaper203.pdf>

Lupton, R and Hayes, D. (2021) 'Great Mistakes in Education Policy And How to Avoid Them in the Future.' <https://policy.bristoluniversitypress.co.uk/great-mistakes-in-education-policy>

At worst, though, it serves as a distraction from the responsibilities of governments to intervene in improving these multiple social determinants, outside of the school setting: 'a conscious shift in the policy discourse towards individual responsibility, which has emphasised social problems as the result of family inadequacies or community deficiencies.'¹⁹³

Parsons (2016) argues:

...policy in the United Kingdom is still about 'removing barriers', adjusting in-school factors (better teaching and discipline, improved school leadership, differentiation, progress-chasing via regular pupil assessment) rather than interventions to lift people out of poverty. The evidence is strong that the causes of low attainment lie largely outside school and could be better tackled if the poverty argument were accepted and addressed.'¹⁹⁴

Pickett and Vanderblomen (2015) agree: 'educationally focused policies and interventions cannot deal with the structural issues of poverty and inequality which are the root causes of educational inequality.'¹⁹⁵ This is also acknowledged by the Social Mobility Commission (2021):

...the government's efforts to advance social mobility have been skewed towards the work of only one department – the Department for Education (DfE). While education is key to boosting opportunities through life, social mobility is not determined by education alone.'¹⁹⁶

This is exemplified by the shift in language and emphasis under successive political regimes which are embodied in the Commission's own name. The Child Poverty Act first established the Child Poverty Commission in 2010.¹⁹⁷ This was then 'renamed the Social Mobility and Child Poverty Commission by the Welfare Reform Act 2012, [and then] changed to the Social Mobility Commission by the Welfare Reform and Work Act 2016' – losing 'poverty' entirely, by the time the Labour government had fully been replaced by the Conservatives.¹⁹⁸

The possibility, then, is that the FSM and Pupil Premium measures are effectively being used in some discourses, narratives, and associated policymaking and electioneering as a conduit to shift responsibility and accountability for social and structural inequalities to individual families and schools. They can be used as a tool to emphasise mean average differences in attainment between children deemed disadvantaged which, largely, are not attributable to schools; to denote a deviant, deficient, distinct group, who are separate from structural gradients and therefore incremental social causes (which can be levered by government, if there is a political will); and to suggest that

¹⁹³ Parsons, C. (2016) 'Ethnicity, gender, deprivation and low educational attainment in England: Political arithmetic, ideological stances and the deficient society.'

<https://journals.sagepub.com/doi/10.1177/1746197916648282>

¹⁹⁴ Parsons, C. (ibid)

¹⁹⁵ Pickett, K. and Vanderblomen, L. (2015) 'MIND THE GAP: Tackling Social and Educational Inequality.'

<https://cptrust.org.uk/wp-content/uploads/2015/09/Pickett-Vanderbloemen-report-ONLINE.pdf>

¹⁹⁶ Social Mobility Commission (2020) 'Monitoring social mobility 2013 to 2020.'

[https://www.gov.uk/government/publications/monitoring-social-mobility-2013-to-2020/monitoring-social-mobility-2013-to-](https://www.gov.uk/government/publications/monitoring-social-mobility-2013-to-2020/monitoring-social-mobility-2013-to-2020#:~:text=As%20our%20work%20shows%2C%20the,not%20determined%20by%20education%20alone.)

[2020#:~:text=As%20our%20work%20shows%2C%20the,not%20determined%20by%20education%20alone.](https://www.gov.uk/government/publications/monitoring-social-mobility-2013-to-2020#:~:text=As%20our%20work%20shows%2C%20the,not%20determined%20by%20education%20alone.)

¹⁹⁷ Gov.uk (2010) 'Child Poverty Act 2010.'

<https://www.legislation.gov.uk/ukpga/2010/9/notes/division/3#:~:text=The%20purpose%20of%20the%20Act,2010%20target%20has%20been%20met.>

¹⁹⁸ Parliament.uk (2018) 'The future of the Social Mobility Commission.'

<https://publications.parliament.uk/pa/cm201719/cmselect/cmeduc/866/86604.htm>

schools should be held accountable for firing the ‘silver bullet’ which will solve inequalities and ‘solve’ the problems with these children, who are ‘in need of conversion’ (Elliot Major, 2023).¹⁹⁹

This is not to conclude that a solution at this point would necessarily be to revise Pupil Premium funding as a distinct stream, or to throw its original conception away – particularly given the general drop in funding for schools and lack of support for families in poverty in wider society. But if its initial intentions are to be returned to, and resources targeted accurately to provide additional support for schools and pupils most in need, then the issues raised throughout this chapter deserve consideration, to refresh a renewed theory of change.

Summary

This chapter has discussed the intended, unintended, and wider consequences of the use of FSM, and the derived Pupil Premium measure, in policymaking and practice. It has highlighted evidence that being deemed ‘Pupil Premium’ may have negative consequences for some pupils - both due to stereotyping and stigma for those denoted, and due to a drawing of focus away from children who are in fact disadvantaged and under-resourced but who are not ascribed Pupil Premium status, because they are not picked up by the FSM measure. It has also reviewed a consistent evidence base showing that the Pupil Premium policy has altered practice within schools – but suggested a lack of evidence on the impacts of this on pupil attainment. It has discussed the part Pupil Premium funding plays within the wider schools funding structure, and indicated that the percentages of children recorded as FSM and Pupil Premium have become increasingly detached from levels of poverty and deprivation nationally. Lastly, it has suggested that continued focus on individual children through their denotation as Pupil Premium may not be the most optimal way to tackle disadvantage – both because of incomplete and inefficient identification of deprivation through the FSM measure, and because the causes of low educational attainment and depressed trajectories lie largely outside of schools and must be tackled by policies and improved conditions in children’s wider lives.

¹⁹⁹Elliot Major, L. (2023) ‘Why we need to stop talking about disadvantage (and what we should talk about instead).’
<https://schoolsweek.co.uk/why-we-need-to-stop-talking-about-disadvantage-and-what-we-should-talk-about-instead/>

Section four: Previous research and discussion on FSM's validity and reliability

There is a long history of research and discussion on the validity of FSM as an indicator when used in research and policy. This stretches even before it was available to analysts as an individual-level measure in the National Pupil Database (NPD). In 2000, Gibbons and Asthana reported:

...criticisms of the use of free-school-meal data (FSM data) are widespread. These focus in particular on its inadequacy as a single surrogate measure of socioeconomic disadvantage - a phenomenon which has a far wider meaning than simple entitlement to Income Support - and on the problem of tying a definition of socioeconomic disadvantage to a criterion which changes over time.²⁰⁰

Gibson and Asthana suggested that misunderstanding the implications of these changes and the limitations of FSM as a measure can lead to conclusions – and policymaking – that is ‘dangerously wrong.’²⁰¹ In the context of debates around the best way to measure segregation between schools, their work, and that of their contemporaries, began two decades of investigation into the FSM measure.²⁰²

This early debate included contributions from Noden (2002), who contested the use of FSM to compare levels of school segregation over time. Noden highlighted that the proportions of children recorded as FSM depend on the economic cycle:

Clearly, as the economy improves, and consequently the proportion of pupils receiving free school meals decreases, so the segregation score increases—and vice versa.²⁰³

Gibson and Asthana (2002) continued the debate, warning again against drawing conclusions based on data reliant on ‘changes in free school meal eligibility’ over time: ‘because free school meal eligibility is not a fixed category.’²⁰⁴

Once the NPD became available, and recorded FSM could be explored and utilised at the pupil-level (rather than only at the school-level), researchers continued to interrogate its validity and reliability, and to discuss implications.

Key studies and points of discussion are reported below. Findings are grouped into those detailing:

- associations between the FSM measure and income-level, low income, and/or poverty;

²⁰⁰ Gibson, A. and Asthana, S. (2000) ‘Estimating the Socioeconomic Characteristics of School Populations with the Aid of Pupil Postcodes and Small-Area Census Data: An Appraisal.’
<https://journals.sagepub.com/doi/abs/10.1068/a3276>

²⁰¹ Gibson, A. and Asthana, S. (2000) ‘What's in a number? Commentary on Gorard and Fitz's “Investigating the determinants of segregation between schools”’
<https://www.tandfonline.com/doi/abs/10.1080/026715200402461>

²⁰² Research Papers in Education (2002) ‘Comment.’
<https://www.tandfonline.com/doi/abs/10.1080/0267152022000031360>

²⁰³ Noden, P. (2002) ‘Education markets and social polarisation: Back to square one?’
<https://www.tandfonline.com/doi/abs/10.1080/0267152022000031360>

²⁰⁴ Gibson, A. and Asthana, S. (2002) ‘Understanding social polarisation: a possible research agenda.’
<https://www.tandfonline.com/doi/abs/10.1080/0267152022000031360>

- relationships between FSM and other socio-economic indicators and family background characteristics;
- associations between FSM and area-level measures;
- relationships between FSM at the individual and the aggregate level;
- the predictive power of FSM;
- and trajectories of FSM.

Research and discussion on the associations between FSM and income-level, low income, and/or poverty

Hobbs (2007) examined the joint distributions of various socio-economic measures and FSM, using detailed early 2000s data from the Avon Longitudinal Study of Parents and Children (ALSPAC) linked to the NPD. While warning that the survey data was not collected contemporaneously with NPD-recorded FSM – meaning that the time lag between measures may account for some lack of congruence – Hobbs concluded that, ‘FSM status is a quite imperfect measure of low income.’²⁰⁵

Halse and Ledger (2007) used the Longitudinal Study of Young People in England (LSYPE) matched to the NPD. This followed a national sample of pupils in secondary school in the 2000s. They found, ‘three quarters of non-FSM pupils came from households with an income of more than £13,000 a year.’ The remaining non-FSM pupils appeared to be in low-income households, but were not recorded as FSM-eligible. Halse and Ledger also found that ‘17 per cent of pupils from families on income support are not registered as FSM eligible.’²⁰⁶ As all pupils with parents/carers claiming income support were entitled to FSM at this time, this indicates under-coverage of the measure.

Kounali et al (2008) analysed data for pupils in 300 Hampshire primary schools. They conducted survey, qualitative, and case study research to understand the associations between recorded FSM eligibility over a four-year period, and other aspects of family circumstance. Their concern particularly was with determining whether it is appropriate to use FSM as a control in judgements of school performance. They found, ‘it is a coarse and unreliable indicator by which school performance is judged and leads to biased estimates of the effect of poverty on pupils’ academic progress.’

Reasons for this conclusion included indications that unstable family circumstances (which in themselves can disadvantage pupils) can prevent claims for FSM, and that child poverty and ‘turbulent circumstances’ are therefore not picked up by the FSM measure. They report:

...among non-working or part-time working lone-parent families...with no capital assets i.e. renting their home, a significant proportion (35.3%) were not observed to be FSM-eligible over the previous four-year period. In other words FSM eligibility data did not identify a significant proportion of low income families.’²⁰⁷

²⁰⁵ Hobbs, G. (2007) ‘Investigating social class inequalities in educational attainment : The effects of schools and the validity of free school meal status as a proxy for socio-economic status.’

<https://discovery.ucl.ac.uk/id/eprint/10020538/>

²⁰⁶ Halse, J and Ledger, A. (2007) ‘The use of free school meal status as a proxy for socioeconomic status: Evidence from matching the Longitudinal Study of Young People in England to the National Pupil Database.’

https://nces.ed.gov/FCSM/pdf/2007FCSM_Halse.VI-C.pdf

²⁰⁷ Kounali, D. et al (2008) ‘The probity of free school meals as a proxy measure for disadvantage.’

<https://www.bristol.ac.uk/media-library/sites/cmm/migrated/documents/fsm.pdf>

Hobbs and Vignoles (2010) used the Family Resource Survey (FRS) to compare FSM receipt, as reported in the survey, and family income – both before and after accounting for income through means-tested benefits and tax credits. They find:

...the range of household incomes of children taking up FSM overlaps considerably with the range for children not taking up FSM. In other words, many children taking up FSM are in households with higher incomes than children not taking up FSM. This makes it likely that many children eligible for and claiming FSM are not in the lowest income households.

They test several explanations for this finding, and report that the most dominant is that, 'receipt of IS [income support] or IB-JSA [income-based jobseekers allowance] and related means-tested benefits pushes children eligible for FSM up the distribution of family income.' They concluded based on this noughties-period data (note that relationships may differ in more recent years):

FSM 'eligibility' is thus a much better proxy of family income before the receipt of means-tested benefits and tax credits than family income after the receipt of means-tested benefits and tax credits. However, most educational research is implicitly or explicitly interested in the family income potentially available to the child, and therefore in measures of family income after the receipt of means-tested benefits and tax credits.

This therefore is a 'problem both for the allocation of school funding and school performance tables, and for other areas of policy' – though the extent to which it is problematic 'will depend on the policy,' and the assumptions about what is being measured, and importance of precision.²⁰⁸

Echoing Hobbs and Vignoles' findings, and using the LSYPE, Ilie et al (2017) estimate that, 'only 48% of those in low-income households are eligible for FSM, and therefore more than half of those children who live in households with very low income and who are presumably therefore at risk of low achievement are still not eligible for FSM.' They speculate that this may result in their 'therefore not [being] identified as being in need of additional support' – a problem because 'One key indicator on which there is evidence of a causal relationship with pupils' achievement is household earnings, or household income.'²⁰⁹

To some extent, assessments of whether FSM is a successful or sufficient proxy for family income-level or poverty depend on thresholds of lenience for error, judgement, and pragmatism. Often these are essentially subjective and arguable. Jerrim (2020, 2021), for example, examines data from the Millenium Cohort Study linked to the NPD, and finds that FSM has the 'strongest correlation with permanent income poverty out of all the measures available [0.69],' then concluding that, 'eligibility for free school meals (averaged over the time a child has spent at school) is the best available proxy for childhood poverty.' On the other hand, FSM 'is of limited use to researchers wanting to understand how key outcomes differ between young people from low, average and high socio-

²⁰⁸ Hobbs, G. and Vignoles, A. (2013) 'Is children's free school meal 'eligibility' a good proxy for family income?' <https://doi.org/10.1080/01411920903083111>

²⁰⁹ Ilie, S. et al (2017) 'Revisiting free school meal eligibility as a proxy for pupil socio-economic deprivation.' <https://bera-journals.onlinelibrary.wiley.com/doi/abs/10.1002/berj.3260>

economic backgrounds’ – because ‘the correlation between FSM and permanent income is notably weaker [0.44].’²¹⁰

Jerrim is by no means unique in deciding on an implicit tolerance for error in validity when assessing the FSM measure – this is something that all researchers and policymakers, including the current authors, enact. Perhaps, however, establishing more clearly an acceptable or unacceptable level of inaccuracy and validity is something that will move forward discussion in this field. This will be explored later in the project.

Research and discussion on the associations between FSM and other socio-economic indicators and family background characteristics

Hobbs’ (2007) study using linked ALSPAC-NPD data concluded that, ‘FSM status is a quite imperfect measure of...employment, or one-parenthood.’ Again, however, this is caveated by the fact that there is a time lag in between the survey-collected family background measures, and FSM as recorded in the NPD – highlighting the importance of comparisons close in time when assessing FSM’s validity as a proxy.²¹¹ Note also that ALSPAC covers only families in the Avon area, and that associations between FSM and other factors may vary by locality.

Hobbs and Vignoles’ investigation in the mid-2000s using the FRS also looked at family structure and parent/carer working patterns, and concluded, ‘FSM “eligibility” is a good proxy of children in workless families but a less good proxy of children in one-parent families.’ They find ‘between 44% and 77% of children eligible for and claiming FSM, are in one-parent families, compared to...between 16% and 22% of children not eligible for and [not] claiming FSM.’²¹²

Halse and Ledger’s (2007) study of the LSYPE cohort found that, ‘58 per cent of FSM pupils come from single-parent households.’ They also found that, ‘the average size of household is larger for FSM pupils (4.5 persons) compared to non-FSM (4.3 persons). FSM pupils have more siblings – an average of 2.2 other brothers and sisters living with them compared to 1.5 for non-FSM pupils.’²¹³ Whether the family composition of children recorded FSM has changed over the years is something we will consider during the empirical strands of this project.

Halse and Ledger explore further characteristics:

76 per cent of pupils from families where the head of household is long term unemployed are claiming eligibility for free school meals, while around a quarter of those from routine backgrounds and a fifth from semi-routine back grounds are FSM eligible. It is clear from the linked LSYPE/NPD data, that FSM is not a particularly accurate proxy for NS-SEC. The majority of pupils from routine and semi-routine backgrounds are not claiming FSM eligibility. And

²¹⁰ Jerrim, J. (2020) ‘Measuring socio-economic background using administrative data. What is the best proxy available?’ <http://repec.ioe.ac.uk/REPEc/pdf/qsswp2009.pdf>

Jerrim, J (2021) ‘Measuring Disadvantage.’ <https://www.suttontrust.com/wp-content/uploads/2021/05/Measuring-Disadvantage-Report.pdf>

²¹¹ Hobbs, G. (2007) ‘Investigating social class inequalities in educational attainment : The effects of schools and the validity of free school meal status as a proxy for socio-economic status.’ <https://discovery.ucl.ac.uk/id/eprint/10020538/>

²¹² Hobbs, G. and Vignoles, A. (2013) ‘Is children's free school meal “eligibility” a good proxy for family income?’ <https://doi.org/10.1080/01411920903083111>

²¹³ Halse, J and Ledger, A. (2007) ‘The use of free school meal status as a proxy for socioeconomic status: Evidence from matching the Longitudinal Study of Young People in England to the National Pupil Database.’ https://nces.ed.gov/FCSM/pdf/2007FCSM_Halse.VI-C.pdf

although the majority of pupils from workless families are eligible for FSM, the majority of FSM pupils are not from workless families.

The lack of cross-over with NS-SEC indicated here for the LSYPE cohort is interesting, given that, as highlighted by the authors, and discussed in Section 3, when policymakers ‘talk about working class, they often mean “FSM eligible”’. Defining “working class” is problematic.’²¹⁴

Halse and Ledger also consider housing tenure, finding pupils recorded as FSM-eligible, ‘are more likely to live in rented accommodation as compared non-FSM (81 per cent compared to 19 per cent),’ and mothers’ education: ‘Mothers of FSM pupils are less well qualified than those of non-FSM pupils. Only 2 per cent have a degree, and more than half have no qualifications at all. Similarly, fathers of FSM pupils are less well qualified.’²¹⁵ Whether these patterns by parental education have changed over the years, with rising levels of participation in higher education, will be explored later in this project. Changes in housing tenure of the FSM-recorded group will also be investigated, as evidence suggests this may too have shifted, and this may interact with place and area.²¹⁶

Iniesta-Martinez and Evans (2012) also analyse data from the LSYPE/NPD, and, more subtly, find that families seemingly eligible for FSM are less likely to claim them if their level of education is higher. This emphasises that investigations of the overlap between FSM and other family characteristics need to consider intersection, and not only raw associations but what (lack of) associations mean, and the nuances between eligibility and sign-up that complicate the extent to which FSM can proxy circumstances.²¹⁷

Correspondingly, Halse and Ledger highlight that:

The non take up of FSM also raises the possibility that an FSM variable might have explanatory power over and above other indicators of economic deprivation. There may be a substantive difference between the characteristics of those who would be eligible, but do not apply, and those who do apply.²¹⁸

This possibility is one we will explore in further work: whether the entitled-but-not-FSM-registered group appears to be clearly delineated by particular family or area characteristics from the entitled-and-FSM-registered group.

Additional work using LSYPE by Ilie et al (2017) concludes the ‘FSM eligibility measure correlates highly with other measures of socio-economic disadvantage’ – but that it is not a perfect proxy. This contrasts with some of Halse and Ledger’s conclusions, for example, ‘that FSM is not a particularly accurate proxy for NS-SEC’ – and emphasises once more that assessments of the validity of FSM tend to be accompanied for all researchers and policymakers by implicit and subjective levels of tolerance for error.

Ilie et al also emphasise that, ‘FSM is a single measure that captures a multidimensional group of pupils from a range of backgrounds.’ This is an important point – pupils recorded as FSM-eligible are

²¹⁴ Halse, J and Ledger, A. (2007) *bid*

²¹⁵ Halse, J. and Ledger, A. (2007) *Ibid*

²¹⁶ Bailey, N. (2023) ‘Private renting and the suburbanisation of poverty.’ <https://ubdc.ac.uk/news-media/2023/october/private-renting-and-the-suburbanisation-of-poverty/>

²¹⁷ Iniesta-Martinez, S and Evans, H. (2012) ‘Pupils not claiming free school meals.’ <https://assets.publishing.service.gov.uk/media/5a79faf540f0b66a2fbff077/DFE-RR235.pdf>

²¹⁸ Halse, J. and Ledger, A. (2007) *Ibid*

not a homogenous group, and so interventions and usages of the measure premised on uniformity of FSM-denoted pupils are likely to be problematic.²¹⁹

Crawford and Greaves conducted work for Teach First, again using the linked LSYPE-NPD, considering how well FSM proxies characteristics considered by Teach First to define educational disadvantage. This approach is interesting because it gathered specific information on what Teach First staff define as constituting 'disadvantage.' The remit of Teach First is explicitly to tackle disadvantage particularly within education – so resulting analyses speak to their policy remit and contrast to more agnostic approaches investigating associations between FSM and other variables.

Crawford and Greaves' analyses found that, 'Over 50% of those classified as educationally disadvantaged have a mother with no formal educational qualifications, compared with 9% of those not classified as educationally disadvantaged' – highlighting the pertinence of this background factor to considering resources within education. They find a correlation between FSM and mothers' education: 'eligibility for FSM (in the past or present) contains predictive information about a young person's educational disadvantage' – and so argue for its use.²²⁰ There may, however, have been shifts over time in the relationships between recorded FSM eligibility and parental education, as suggested by Ross et al's (2020) comparisons of cohorts: we will explore this during further analyses.²²¹

Research and discussion on the associations between FSM and area-level measures

Styles (2008) used data from the 2001 national census to compare school-level proportions of children recorded as FSM-eligible to averaged characteristics of the local area experienced by children within a school. Styles finds a high correlation between area employment levels and FSM (0.81), lone parent prevalence (0.81), and council housing occupation (0.8).

Styles also uncovers a number of very weak correlations, suggesting, 'perhaps the weaker correlations...indicate more interesting variables. These are providing new information that only loosely correlates with proportion FSM at the school-level.' These include education-levels in the area (0.19), types of occupations (0.47), and population mobility (0.09).

By concentrating at the school-level, Styles also highlights that the lack of discriminatory power of FSM holds not only when it is used at the individual-level:

The distribution of percentages of pupils eligible for FSM in each school in England in 2003 [has a] sharp skew towards lower percentages [which] means that the variable is not good at distinguishing between schools at the better end of the socioeconomic spectrum. The variable is only useful in contrasting those schools with a more deprived intake.²²²

²¹⁹ Ilie, S. et al (2017) 'Revisiting free school meal eligibility as a proxy for pupil socio-economic deprivation.' <https://bera-journals.onlinelibrary.wiley.com/doi/abs/10.1002/berj.3260>

²²⁰ Crawford, C. and Greaves, E. (2013) 'A comparison of commonly used socio-economic indicators: their relationship to educational disadvantage and relevance to Teach First.' https://ifs.org.uk/sites/default/files/output_url_files/r79.pdf

²²¹ Ross, A. et al (2020) 'Examining the London advantage in attainment: evidence from LSYPE.' <https://www.gov.uk/government/publications/examining-the-london-advantage-in-attainment-evidence-from-lsype#:~:text=Details,of%20factors%20than%20previous%20studies.>

²²² Styles, B. (2007) 'Moving on from free school meals: national census data can describe the socio-economic background of the intake of each school in England.' <https://www.tandfonline.com/doi/abs/10.1080/00131880801920387>

This echoes Jerrim's finding that FSM at the individual-level 'is of limited use to researchers wanting to understand how key outcomes differ between young people from low, average and high socio-economic backgrounds' – because it only distinguishes at the lower end of the distribution.²²³ Styles contrasts this with other school-level measures, which are not skewed and which are more evenly distributed – such as the 'mean percentage of unqualified people per school intake neighbourhood.'

Crawford and Greaves' (2013) work for Teach First finds that, at the school level, the mean score for pupils' areas of residence on the Income Deprivation Affecting Children Index (IDACI) overlaps strongly with the proportion of pupils recorded as FSM within the school, in terms of classifying a cut-off point for disadvantage. They recommend that using proportion FSM would slightly improve accuracy of classification, but not provide an enormous amount of new information.²²⁴

Comparing the predictive power of different measures for the Key Stage 4 attainment of the LSYPE cohort, Sutherland et al (2015) find that, 'Some combinations of neighbourhood based measures are stronger predictors of pupil achievement' than FSM – but state, 'neighbourhood based measures may be harder to interpret and in any case neighbourhood measures are not associated with the individual child.'²²⁵

Research by FFT correspondingly flags that neighbourhood measures have their own, additional caveats – including that, though the IDACI largely mirrors FSM in terms of the benefits entitlements classifying children as 'deprived,' it includes families with children in independent schools (who are not recorded in the NPD population). The proportion of such pupils will vary by area.²²⁶

Hannay (2023) extends thinking about the use of area deprivation measures in policymaking for schools, initially comparing various indicators with schools' Pupil Premium rates, and finding large disparities: 'schools with identical or near-identical values for this metric can exist in widely divergent local contexts with very different socioeconomic characteristics.' Hannay then states:

Each of these tells us something different, and they are all distinct from the school's PP measure... By reducing school-level disadvantage to a one-dimensional ranking, we risk overlooking the different forms of deprivation that children experience, and the qualitatively distinct social contexts in which schools operate. For example, schools might need to act differently depending on whether the most prevalent forms of deprivation in their area relate to crime, housing, health, the environment or participation in higher education. In addition, those (including us) who might compare one school against another superficially similar one need to recognise that when disadvantage is boiled down to a single number it often simplifies away a range of contextual dissimilarities that might be important.²²⁷

²²³ Jerrim, J. (2020) 'Measuring socio-economic background using administrative data. What is the best proxy available?' <http://repec.ioe.ac.uk/REPEc/pdf/qsswp2009.pdf>

²²⁴ Crawford, C. and Greaves, E. (2013) 'A comparison of commonly used socio-economic indicators: their relationship to educational disadvantage and relevance to Teach First.' https://ifs.org.uk/sites/default/files/output_url_files/r79.pdf

²²⁵ Sutherland, A. et al (2015) 'Factors associated with achievement: key stage 4.' https://assets.publishing.service.gov.uk/media/5a7f519aed915d74e6229bc8/RB407_-_Factors_associated_with_achievement_-_key_stage_4_brief.pdf

²²⁶ Thomson, D. and Plaister, N. (2019) 'The 2019 Income Deprivation Affecting Children Index.' <https://ffteducationdatalab.org.uk/2019/09/the-2019-income-deprivation-children-index/>

²²⁷ Hannay (2023) 'Should disadvantage be reduced to a single number?' <https://www.schooldash.com/blog-2306.html#20230622>

Relationships between FSM at the individual and the aggregate level

That the FSM indicator pertains solely to the individual pupil has long been cited as one of its advantages over area-level measures of disadvantage or deprivation. This is based on an assumption that, even given known limitations, FSM status originates exclusively with the individual family and that this lends accuracy and clarity in terms of what is being picked up.²²⁸ But, in fact, the relationship may not be so clear-cut. There is evidence that structural, compositional, and cultural factors at the group and local level can impact on individual registration, and so on the composition of the groups of children denoted as FSM/non-FSM. A number of these factors are detailed below.

Proportion of FSM-eligible pupils and area-level disadvantage

One factor is the level of disadvantage in an area. This may be for various reasons. First, schools with a higher proportion of FSM-entitled pupils have more incentive to engage in activities to encourage applications, as, for example, the Pupil Premium payments they receive will be proportionally greater.

Second, the stigma associated with FSM appears to be less in schools and local areas with more FSM-eligible pupils.²²⁹ Evidence from school case studies and from surveys with pupils suggests that stigma prevents some eligible families from claiming FSM.²³⁰ Among pupils who responded to a survey by the Child Poverty Action Group who explained they do not feel stigmatised for having FSM, which enables sign-up, one of the reasons given was that FSM was a common experience at their school.²³¹ These findings are echoed in other research with school staff, parents/carers and pupils.²³²

²²⁸ Styles, B. (2008) 'Moving on from free school meals: national census data can describe the socio-economic background of the intake of each school in England.'

<https://www.tandfonline.com/doi/abs/10.1080/00131880801920387>

Gorard, S. (2011). 'Who is eligible for free school meals? Characterising free school meals as a measure of disadvantage in England.' <https://www.tandfonline.com/doi/abs/10.1080/01411926.2011.608118>

Kounali, D. et al (2008) 'The probity of free school meals as a proxy measure for disadvantage.'

<https://www.bristol.ac.uk/media-library/sites/cmm/migrated/documents/fsm.pdf>

Sutherland, A. et al (2015) 'Factors associated with achievement: key stage 4.'

[https://assets.publishing.service.gov.uk/media/5a7f519aed915d74e6229bc8/RB407 -](https://assets.publishing.service.gov.uk/media/5a7f519aed915d74e6229bc8/RB407_-_Factors_associated_with_achievement_-_key_stage_4_brief.pdf)

[Factors associated with achievement - key stage 4 brief.pdf](https://assets.publishing.service.gov.uk/media/5a7f519aed915d74e6229bc8/RB407_-_Factors_associated_with_achievement_-_key_stage_4_brief.pdf)

<https://www.tandfonline.com/doi/full/10.1080/01425692.2021.2017852>

²²⁹ Addis, S. and Murphy, S. (2019) 'Free school meals: Socio-ecological influences on school level take up of entitlement.' <https://www.magonlinelibrary.com/doi/abs/10.12968/bjsn.2018.13.8.394>

James, J. (2012) 'Peer Effects in Free School Meals: Information or Stigma?'

https://www.mwpweb.eu/1/132/resources/document_344_1.pdf

²³⁰ Carpenter, H. et al (2013) 'Evaluation of Pupil Premium Research Report.'

<https://dera.ioe.ac.uk/id/eprint/18010/1/DFE-RR282.pdf>

Child Poverty Action Group (2012) 'Going hungry? Young people's experiences of free school meals.'

<https://cpag.org.uk/sites/default/files/Going%20Hungry%20young%20peoples%20experiences%20of%20Free%20School%20Meals.pdf>

²³¹ Child Poverty Action Group (2012) Ibid

²³² Sahota, P. et al (2014) 'Factors influencing take-up of free school meals in primary- and secondary-school children in England.' <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10282406/>

James, J. (2012) 'Peer Effects in Free School Meals: Information or Stigma?'

https://www.mwpweb.eu/1/132/resources/document_344_1.pdf

FSM registration rates are relatively lower in schools with lower rates of FSM eligibility, and areas with lower levels of deprivation.²³³ Research by the Department for Education finds that take up of free lunches is higher in schools with a higher proportion of pupils eligible for FSM.²³⁴ Relatedly, the Department found that eligible children were more likely to take up the meals to which they were entitled when a scheme of universal provision was piloted. While accessing actual meals is a separate point to sign up as eligible, this suggests that social processes or other aspects of widespread roll-out and normalisation encourage participation.²³⁵

In terms of the use of FSM as a measure in research and policymaking, the relationship between local prevalence and norms and individual registration is potentially problematic for a number of reasons. For example, pupils who are more isolated and unusual in being relatively disadvantaged within their school may be of particular interest (such as in investigations of school composition or social segregation).²³⁶ But they are less likely to be identified, introducing bias to measures in such research. In terms of FSM's use in funding allocation, children in schools with higher levels of relative disadvantage may be more likely to 'count' as disadvantaged, and to be incorporated in calculations.

Fundamentally, there seems to be a spillover here and an intertwining of ecological factors with individual-level factors: this is problematic for analyses assuming the two to be distinct, and school-level proportion FSM, or area-level deprivation measures, completely separate from individual pupils' FSM/non-FSM status.

The Sutton Trust (2009) found that attainment at GCSE for pupils recorded as FSM was 'ski jump'-shaped according to their proportion of in-school peers also FSM. That is, there is an 'uplift in examination results in the most deprived schools,' as measured by percentage FSM, compared to those with medium-high proportions.²³⁷ The extent to which this is an artefactual, area, or compositional effect, related to the other characteristics of families who sign up for FSM eligibility, or who are entitled, and cluster within areas and schools, remains fully to be explored.

Differences in the ethnic background and composition of schools and LAs

Differences in ethnic and cultural diversity and composition across areas may also contribute to patterns of FSM take-up and registration, again suggesting a continuation rather than a separation between the individual and their context, background, and social group. Research with schools has found staff perceptions that families from some religious backgrounds do not trust the institution to prepare food in-line with religious customs/requirements.²³⁸ Pupils have also raised associated

²³³ Iniesta-Martinez, S. & Evans, H. 2012 'Pupils not claiming free school meals.'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/183380/DFE-RR235.pdf

²³⁴ Wollny, I. et al (2015) 'School lunch take-up survey 2013 to 2014.'

https://assets.publishing.service.gov.uk/media/5a7e1f50ed915d74e62243f4/RR405_-_School_Lunch_Take-up_Survey_2013_to_2014.pdf

²³⁵ Department for Education (2012) 'Free school meals pilot: impact report.'

<https://www.gov.uk/government/publications/evaluation-of-the-free-school-meals-pilot-impact-report>

²³⁶ Gorard, S. (2023) 'Segregation and the attainment gap for permanently disadvantaged pupils in England.'

<https://www.tandfonline.com/doi/pdf/10.1080/00131911.2021.2007055>

²³⁷ Sutton Trust (2009) 'Attainment gaps between the most deprived and advantaged schools'

[https://eprints.lse.ac.uk/23921/1/Attainment_gaps_between_the_most_deprived_and_advantaged_schools_\(summary\).pdf](https://eprints.lse.ac.uk/23921/1/Attainment_gaps_between_the_most_deprived_and_advantaged_schools_(summary).pdf)

²³⁸ Carpenter, H. (2013) 'Evaluation of Pupil Premium.' <https://dera.ioe.ac.uk/id/eprint/18010/1/DFE-RR282.pdf>

issues. For example, Muslim pupils have commented to researchers that there are insufficient Halal options and unclear labelling of foods.²³⁹

A survey of Heads suggested that ‘cultural perception of welfare combined with language barriers and a poor understanding of the process of Free School Meals’ may ‘inhibit...FSM take-up among ethnic-minority families.’²⁴⁰ There are also wider indications that some migrant and ethnic groups in the UK are relatively less likely to take up the welfare benefits to which they are entitled, impacting on eligibility for FSM.²⁴¹

Previous research has correspondingly found that there are differences in levels of FSM across different ethnic groups, which are incongruent with measured levels of poverty within these different groups. For example, there is a notable difference between poverty rates for Pakistani and Bangladeshi children in Primary Reception and levels of FSM. There is a bigger gap between the poverty rate and FSM registration for some ethnic groups compared to others.²⁴²

This will be investigated in our empirical work. Meanwhile, the immediate possibility raised here is that FSM may be a better indicator of disadvantage for pupils from some backgrounds than others, and in schools or areas with certain make-ups rather than others. There is an intersectional, multi-level aspect to its validity, and various further complexities. For example, one study found that ‘a pupil is more likely to enrol for free school meals when surrounded by more of their peers who share a common ethnicity and language, if that ethnic language group is a high free school meal using group at the national level.’²⁴³ So both in terms of family background and again in local area composition, ethnicity plays a part in determining propensity to be identified as FSM-eligible.

Proportions of pupils with English as an additional language

As flagged above, families having English as an additional language (EAL), and fluency in English, in themselves appear to be relevant to FSM registration. Language skills might impact the ease of the application process, as well as awareness of the availability of FSM, depending on the school’s level of involvement in encouraging applications. Parents/carers struggling with literacy or not speaking English have been identified by schools as a challenge to raising awareness of and encouraging applications for FSM.²⁴⁴ The term EAL will of course apply to pupils who have a diverse range of characteristics and experiences, depending on levels of English language proficiency and at what

²³⁹ Sahota, P. et al (2014) ‘Factors influencing take-up of free school meals in primary- and secondary-school children in England.’ <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10282406/>

²⁴⁰ Montemaggi, F. et al (2016) ‘The take-up of Free School Meals in Catholic schools in England and Wales.’ <https://www.stmarys.ac.uk/research/centres/benedict-xvi/docs/free-school-meal-report.pdf>

²⁴¹ Montemaggi, F. et al (2016), Ibid

²⁴² Campbell, T. and Obolenskya, P. (2021) ‘No such thing as a free lunch?’ <https://sticerd.lse.ac.uk/CASE/new/PUBLICATIONS/abstract/?index=8641>

²⁴³ James, J. (2012) ‘Peer Effects in Free School Meals: Information or Stigma?’ https://www.mwpweb.eu/1/132/resources/document_344_1.pdf

²⁴⁴ Sahota, P. et al (2014) ‘Factors influencing take-up of free school meals in primary- and secondary-school children in England.’ <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10282406/>

Woodward, J et al (2015) ‘Interventions to increase free school meal take-up.’ <https://core.ac.uk/reader/29019300>

James, J. (2012) ‘Peer Effects in Free School Meals: Information or Stigma?’ https://www.mwpweb.eu/1/132/resources/document_344_1.pdf

point they have joined the English education system - which presents a challenge for determining how these factors interact in the NPD, which simply records EAL (not proficiency).²⁴⁵

Regional variation

Iniesta-Martinez and Evans (2012) compared benefits data from HMRC to NPD records, and found large disparities by local authority and region in FSM registration among entitled families. The extent to which these differences relate to local norms and cultures which may in part stem from the factors outlined above is as yet unknown. There are sizable differences, however, which suggest that environmental or aggregate factors impact an individual's likelihood of being recorded as FSM-eligible: 'In the South East and East of England nearly one quarter of entitled pupils are not claiming FSM, which contrasts sharply with the North East where the equivalent figure is 2%...At local authority (LA) level under-registration rates range between 0% and 33%.²⁴⁶

Research and discussion on the predictive power of FSM

Hobbs' (2007) ALSPAC-NPD research includes a discussion on the different uses of FSM as a factor within predictive modelling. This differentiates uses where it is the variable of interest – and assumed to be a perfect proxy, for example, for income. Here it is used to examine the experiences specifically of low-income pupils, or to map segregation or school composition, based on an assumption that FSM/non-FSM distinctly proxies discreet groups. In other cases, FSM is used as a control variable, to account for variance, or provide explanatory power in a regression. Hobbs suggests that in the latter case, 'The extent of imperfect proxy bias...is context specific' – it depends on the question being asked and what the FSM variable is being assumed to do.

In both cases, however, Hobbs' analyses of FSM's predictive power lead to conclusions that, 'There is a large bias when using FSM status to estimate differences in average KS2 achievement by low-income status,' and that, 'When used as a control variable in a model of KS2 achievement, FSM status reduces the bias from omitting measures of socio-economic status to a limited extent only.'²⁴⁷ Essentially, then, Hobbs suggests that there is a lot that is not accounted for by FSM in predicting KS2 results, at least in the early-2000s ALSPAC sample.

Halse and Ledger's (2007) paper discusses and models the predictive power of the FSM measure in terms of pupil progress between 11 and 16, compared to other variables indicating socio-economic status. They emphasise the gradient in pupil outcomes when these other, more nuanced measures are used. For example, that there is an incremental association between hierarchical NS-SEC employment categorisations and progress: 'The simple dichotomous measure of FSM status does not capture this.'²⁴⁸

²⁴⁵ The Bell Foundation (2021) 'Diversity of Learners who use English as an Additional Language.'
<https://www.bell-foundation.org.uk/eal-programme/guidance/diversity-of-learners-who-use-english-as-an-additional-language/>

²⁴⁶ Iniesta-Martinez, S. and Evans, H. (2012) 'Pupils not claiming free school meals.'
<https://dera.ioe.ac.uk/id/eprint/16039/>

²⁴⁷ Hobbs, G. (2007) 'Investigating social class inequalities in educational attainment : The effects of schools and the validity of free school meal status as a proxy for socio-economic status.'
<https://discovery.ucl.ac.uk/id/eprint/10020538/>

²⁴⁸ Halse, J and Ledger, A. (2007) 'The use of free school meal status as a proxy for socioeconomic status: Evidence from matching the Longitudinal Study of Young People in England to the National Pupil Database.'
https://nces.ed.gov/FCSM/pdf/2007FCSM_Halse.VI-C.pdf

This is important not only because the use of FSM obscures this variation, but because, used uncritically, it can imply that the FSM group are discrete from the rest of the gradient: deficient, 'deviant,' or homogenous – rather than being subject to a sliding scale of advantage or disadvantage within the education system and wider society.²⁴⁹ While Gorard (2012) argues that, 'if our concern as analysts is, as it often is, what happens to the poorest in society, then that is not necessarily a limitation,' this depends to an extent whether 'the poorest in society' are a construct, as opposed to a real, discrete, uniform group.²⁵⁰

Farquharson et al (2022) emphasise this distinction, and the fact that attainment is not inherently peculiarly different for the poorest children:

...the role of family background is not limited to the poorest – household income is a strong predictor of attainment for better-off families too. While around 40% of young people who just miss out on free school meals achieve good GCSEs, that rises to 70% of 16-year-olds in the richest third of families. Even within this better-off group, family income is an important predictor of higher levels of attainment: children in the 10% richest families are more than twice as likely as those in the seventh decile to earn at least one A or A* grade at GCSE.²⁵¹

Dearden et al (2011) explore the power of Contextualised Value Added (CVA) models, used in the 2000s to attempt to compare the performance of schools with similar pupil compositions. Using data from the LSYPE, they examine the whole range of variables included in CVA models – which includes FSM – and the extent to which they are able to proxy other factors known strongly to be related to pupil attainment.

They find particularly that mothers' education fails to be proxied by the CVA variables – including FSM – and that 'only 26 per cent of the variance in mother's education is explained by the covariates in the CVA model.' Given the importance of maternal education to their children's outcomes, they conclude that this results in erroneous conclusions regarding the 'value added' by schools.

There are also other important implications of these findings for uses of FSM beyond school accountability. If it does not capture the bulk of a key, highly and directly relevant factor predicting educational experiences and outcomes – to what extent is its use valid? Dearden et al recommend that, 'The policy response to the problem identified in this paper is reasonably simple: to collect better background information...important determinants, such as parental education...could be collected as part of the PLASC return.' Dearden et al argue that, 'this seems feasible given that parents already provide some information about their children to the schools, such as ethnicity.'²⁵²

Ilie et al (2017) similarly find that parental education is a key predictor of children's outcomes within education, and not sufficiently proxied by FSM. They warn that, 'policy implications...are, for

²⁴⁹ Elliot Major, L. (2023) 'Why we need to stop talking about disadvantage (and what we should talk about instead).' <https://schoolsweek.co.uk/why-we-need-to-stop-talking-about-disadvantage-and-what-we-should-talk-about-instead/>

Cooper, K. (2020) 'Are Poor Parents Poor Parents? The Relationship between Poverty and Parenting among Mothers in the UK.' <https://journals.sagepub.com/doi/full/10.1177/0038038520939397>

²⁵⁰ Gorard, S. (2011) 'Who is eligible for free school meals? Characterising free school meals as a measure of disadvantage in England.' <https://www.tandfonline.com/doi/abs/10.1080/01411926.2011.608118>

²⁵¹ Farquharson, C. et al (2022) 'Education inequalities: Changes in education over time.' <https://ifs.org.uk/inequality/education-inequalities/>

²⁵² Dearden, L. et al (2011) 'Measuring School Value Added with Administrative Data: The Problem of Missing Variables.' <https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1475-5890.2011.00136.x>

example, that these children with low-educated parents and at risk of low achievement miss out on additional support or funding if it is targeted purely on the basis of FSM eligibility.’²⁵³

Sutherland et al (2015a, 2015b) explored ‘which possible proxies for deprivation are the strongest predictors of achievement at the end of secondary school,’ using linked LSYPE-NPD (in 2006). They also undertook similar analyses examining attainment at the end of primary school, using the Millenium Cohort Study, again linked to the NPD (in 2012).

They find that the ‘pattern of results was very similar for primary and secondary school achievement, i.e. the predictive power of FSM eligibility relative to other proxy variables showed similar patterns’ – but that ‘the magnitude of the variation that was explained in the KS2 achievement models was much less than in the secondary school models.’ They suggest that this could ‘be caused by differences in the outcomes being assessed, as well as differences in the sample and other variables used in the model.’ It is also possible however that trajectories of attainment become increasingly embedded and determined as children move through the education system.

For secondary pupils, ‘ever FSM’ over the past five years explained 23% of the variance at GCSE, compared to 20.7% using current FSM in Year 11. For primary pupils, 14% of the variance at KS2 was explained by including FSM in models. The research found that ‘Parental occupation, parental education, and other household characteristics are slightly better predictors of pupil achievement than FSM eligibility.’ However, it warned pragmatically that, ‘these proxies have the problem that at-scale collection of this information is likely to be impractical and difficult.’²⁵⁴

It is sometimes implied in studies like this (which explore the predictive power or variation explained by measures using FSM) that because FSM has a reasonable association with pupil outcomes, it is a sufficient measure for at least some uses. What complicates these conclusions is the fact that being attributed and known to ‘be FSM’ may in itself contribute to outcomes within the system, leading to circularity.²⁵⁵

Ilie et al’s (2017) analyses are potentially suggestive of this. Examining predictors of GCSE attainment, they find that even in models including a variety of demographic and socio-economic characteristics known to be directly and indirectly related to children’s outcomes, FSM retains explanatory power. They suggest that this might indicate, ‘FSM eligibility may capture something unique about the lived

²⁵³ Ilie, S. et al (2017) ‘Revisiting free school meal eligibility as a proxy for pupil socio-economic deprivation.’ <https://bera-journals.onlinelibrary.wiley.com/doi/abs/10.1002/berj.3260>

²⁵⁴ Sutherland, A. et al (2015) ‘Factors associated with achievement: key stage 2.’ https://assets.publishing.service.gov.uk/media/5a74fe2540f0b6399b2afcf7/RR486_-_Factors_associated_with_achievement_-_key_stage_2.pdf

Sutherland, A. et al (2015) ‘Factors associated with achievement: key stage 4.’ https://assets.publishing.service.gov.uk/media/5a7f519aed915d74e6229bc8/RB407_-_Factors_associated_with_achievement_-_key_stage_4_brief.pdf

²⁵⁵ Burgess, S. and Greaves, E. (2009) ‘Test Scores, Subjective Assessment and Stereotyping of Ethnic Minorities.’ <https://www.bristol.ac.uk/media-library/sites/cmpo/migrated/documents/wp221.pdf>
Bradbury, A. (2011) ‘Rethinking assessment and inequality: the production of disparities in attainment in early years education.’ http://mmiweb.org.uk/scitts/tutors/downloads/4_Assignment_2/assessment_lit_gen/%20Bradbury_2011_EY_Ass.pdf

Raey, D. (2017) ‘The UK is still educating different classes for different functions in society.’ <https://blogs.lse.ac.uk/europpblog/2017/12/27/the-uk-is-still-educating-different-classes-for-different-functions-in-society/>

experience of deprivation.²⁵⁶ It is possible that this includes labelling, 'ability'-grouping, or other processes depressing children's trajectories within schools, instead or as well as uncaptured aspects of the lives of those recorded as FSM-eligible.²⁵⁷ This will be investigated further during the course of the current project.

Relatedly, Sutherland et al warn against extrapolating from associations within aggregate models down to the individual child:

The statistical models presented in this report (and the sister report on KS4) can be used for systems analysis, and/or to better understand the relationship between socio-economic disadvantage and pupil achievement. But they are probabilistic and can predict likely achievement for groups of students who have particular characteristics on average. They cannot be reliably used to predict an individual child's future achievement since there is likely to be much variation around the average and a considerable amount of error for children who are not near the average.²⁵⁸

Treadaway (2014) similarly provides an important warning regarding interpretation of findings using FSM in predictive models, and the distinctions between the aggregate, the average and the individual. 'It is important to emphasise that...groupings identified each represent the average of a large number of pupils. Individuals and their circumstances vary and there are many, but not yet enough, disadvantaged pupils who make good progress.'²⁵⁹

Allen (2018) reiterates this point, citing analysis from the Department for Education showing the distribution of fine-grained scores across reading, writing and mathematics, among children denoted Pupil Premium and non-Pupil Premium: 'group means mask the extent to which pupil premium students are almost as different from each other than they are from the non-pupil premium group of students.'²⁶⁰

It is important to distinguish the propriety of estimates based on aggregates for different purposes – at the individual, school, area or national level. This will be explored during the course of the current project. While the mean is of interest, the distribution is also crucial, and the overlap in attainment

²⁵⁶ Ilie, S. et al (2017) 'Revisiting free school meal eligibility as a proxy for pupil socio-economic deprivation.'
<https://bera-journals.onlinelibrary.wiley.com/doi/abs/10.1002/berj.3260>

²⁵⁷ Campbell, T. (2021) 'In-class 'ability'-grouping, teacher judgements and children's mathematics self-concept: evidence from primary-aged girls and boys in the UK Millennium Cohort Study.'

<https://www.tandfonline.com/doi/pdf/10.1080/0305764X.2021.1877619>

Campbell, T. (2015) 'Stereotyped at Seven? Biases in Teacher Judgement of Pupils' Ability and Attainment.'

<https://www.cambridge.org/core/journals/journal-of-social-policy/article/abs/stereotyped-at-seven-biases-in-teacher-judgement-of-pupils-ability-and-attainment/B6907C36F39D0476DB795A9EE7D7D6F7>

Burgess, S. and Greaves, E. (2009) 'Test Scores, Subjective Assessment and Stereotyping of Ethnic Minorities.'

<https://www.bristol.ac.uk/media-library/sites/cmpo/migrated/documents/wp221.pdf>

²⁵⁸ Sutherland, A. et al (2015) 'Factors associated with achievement: key stage 2.'

[https://assets.publishing.service.gov.uk/media/5a74fe2540f0b6399b2afcf7/RR486 -
Factors associated with achievement - key stage 2.pdf](https://assets.publishing.service.gov.uk/media/5a74fe2540f0b6399b2afcf7/RR486_-_Factors_associated_with_achievement_-_key_stage_2.pdf)

²⁵⁹ Treadaway, M. (2014) 'Pupil Premium and the invisible group.'
<https://ffteducationdatalab.org.uk/wp-content/uploads/2017/06/FFT-Research-Pupil-Premium-and-the-Invisible-Group.pdf>

²⁶⁰ Department for Education (2015) 'National curriculum assessments at key stage 2 in England, 2015 (revised).'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/483897/SFR47_2015_text.pdf

Allen, B. (2018) 'The pupil premium is not working (part I): Do not measure attainment gaps.'

<https://rebeccaallen.co.uk/2018/09/10/the-pupil-premium-is-not-working/>

between FSM/non-FSM and Pupil Premium/non-Pupil Premium children begs many questions: what is similar about the high attainers, across those who are Pupil Premium and those not? What about the low attainers? Are these unmeasured factors more important in predicting attainment than the FSM/Pupil Premium measure? Does concentrating on the pattern formed by the mean average ‘gap,’ rather than looking across the distribution, lead us to ‘stereotype groups of people who are not as dissimilar to others as the mean average would have us believe’?²⁶¹

Trajectories of FSM

A number of papers have examined trajectories of FSM, and implications of different combinations over pupils’ histories for uses of the measure.

The Sutton Trust (2009) posited ‘a “hidden poor” among pupils in our schools who have at some point in their schooling been eligible for a Free School Meal, but who are not eligible for a Free School Meal in their current year.’ They detail how:

In 2006, 13.6% of secondary school pupils in England were eligible for a Free School Meal in their GCSE year (roughly 75,000 pupils). But an additional 7.7% of pupils were eligible for a Free School Meal earlier during their secondary school career (roughly 42,000 pupils). These pupils are in many ways indistinguishable from ‘FSM’ pupils – facing the same levels of educational disadvantage. And yet they are ignored in the calculation of official attainment gaps.’

The transitional arrangements for FSM eligibility under Universal Credit clearly impact FSM trajectories, as discussed in Section two. But whether there has been a shift in the proportions of pupils experiencing different trajectories throughout primary and/or secondary school over the years preceding the transition remains to be explored.

Attention to the complexities of trajectories led the Department for Education to select ‘Ever6’ as the measure to underpin the Pupil Premium: whether a pupil has been recorded as FSM-eligible over the past six years, or not.²⁶²

Gorard (2012) problematises this, however, as well as other analyses where a simple ‘ever’ binary or a count of positive instances is used to summarise FSM histories. Gorard argues that histories that do not account for the years in which FSM status is missing for a child – because they are not enrolled at state schooling and in the NPD at the given point – omit important information on disadvantage. Potentially, these additional ‘missing’ values should be factored into trajectories – because not being present in school at all is distinct both from being present and recorded FSM-eligible, and being present and recorded non-eligible.²⁶³

The work of Treadaway (2014) also presents a challenge to the choice of the ‘Ever6’ measure. Treadaway finds that the attainment and progress of pupils who have been recorded as FSM even at a point more distant than the last six years is, ‘much closer to that of pupil premium [‘Ever6’] pupils than it is to those who have never been FSM.’

²⁶¹ Allen, B. (2018) ‘The pupil premium is not working (part I): Do not measure attainment gaps.’ <https://rebeccaallen.co.uk/2018/09/10/the-pupil-premium-is-not-working/>

²⁶² Department for Education (2023) ‘Pupil premium: overview.’ <https://www.gov.uk/government/publications/pupil-premium/pupil-premium>

²⁶³ Gorard, S. (2011) ‘Who is eligible for free school meals? Characterising free school meals as a measure of disadvantage in England.’ <https://www.tandfonline.com/doi/abs/10.1080/01411926.2011.608118>

Additionally, adding complexity, Treadaway finds that the gradient of decreased progress in attainment by instances of recorded FSM holds mainly for White British children, while: ‘for ethnic minority pupils...the decrease with increasing %FSM is much lower.’²⁶⁴ This raises questions about what exactly is being represented by the FSM variable, and how it proxies different things for different pupil groups. Ross et al’s (2020) analyses of the first and second Longitudinal Study of Young People in England show that the education-related attitudes and behaviours of families recorded FSM-eligible vary according to ethnicity.²⁶⁵ Given evidence that benefits-claiming patterns vary by ethnic background, this again suggests intersectional heterogeneities within the FSM-recorded group.

Treadaway’s (2017) analyses of the movement of attainment ‘gaps’ over years between pupils classified differently according to combinations of their FSM histories emphasises that the interpretation and construction of these gaps depends on analytical choices, cuts, and categorisations. He shows that in the preceding years:

...attainment has been improving for some groups – those FSM-eligible for less than 60% of their time in schools [but] the improvement has been small for pupils who were FSM-eligible for between 60% and 90% of the time... And for pupils who were FSM-eligible on almost every occasion the school census is taken (90% or more of the time), their attainment, relative to the national average, has actually been falling.²⁶⁶

Gorard and Siddiqui (2019) add to the literature on trajectories of FSM by exploring ‘the course of one age cohort of 550,000 pupils from the National Pupil Database through their entire schooling to the age of 16.’ They highlight that the conferral of Pupil Premium funding based on ‘Ever6’ FSM favours schools whose pupils have more rarely fallen into the FSM category. A school with more ‘occasionally FSM’ children may have a less disadvantaged intake than one where children are constantly FSM-eligible – but can receive equivalent funding based on the ‘ever’ measure.²⁶⁷

In subsequent work, Gorard et al (2021) also emphasise how this seems to play out at the local authority level:

...it is clear that local authorities in England with high attainment gaps have fewer EverFSM6 pupils who have only been eligible for one year in their school (and proportionately more long-term FSM-eligible pupils). This is because these pupils, while labelled disadvantaged, have much higher average attainment than pupils with longer-term eligibility.²⁶⁸

They conclude, like Treadaway (2014) that, ‘the number of years a pupil has been known to be eligible for FSM is a better summary variable in terms of predictive power than either current FSM or

²⁶⁴ Treadaway, M. (2014) ‘Pupil Premium and the invisible group.’ <https://ffteducationdatalab.org.uk/wp-content/uploads/2017/06/FFT-Research-Pupil-Premium-and-the-Invisible-Group.pdf>

²⁶⁵ Ross, A. (2020) ‘Examining the London advantage in attainment: evidence from LSYPE.’ <https://www.gov.uk/government/publications/examining-the-london-advantage-in-attainment-evidence-from-lsype#:~:text=Details,of%20factors%20than%20previous%20studies>

²⁶⁶ Treadaway, M. (2017) ‘Long-term disadvantage, part one: Challenges and successes.’ <https://ffteducationdatalab.org.uk/2017/07/long-term-disadvantage-part-one-challenges-and-successes/>

²⁶⁷ Gorard, S. and Siddiqui, N. (2019) ‘How Trajectories of Disadvantage Help Explain School Attainment.’ <https://journals.sagepub.com/doi/full/10.1177/2158244018825171#:~:text=Using%20the%20number%20of%20years%20a%20student%20has%20been%20known,regions%20and%20of%20different%20types.>

²⁶⁸ Gorard, S. et al (2019) ‘The difficulties of judging what difference the Pupil Premium has made to school intakes and outcomes in England.’ <https://www.tandfonline.com/doi/full/10.1080/02671522.2019.1677759>

EverFSM6.’ Gorard et al also find that a sequential examination of the ordering of pupils’ FSM status over their whole trajectory provides additional explanatory value for Key Stage Four attainment.²⁶⁹

Gorard’s recent (2023) work presents some further considerations when using FSM as a measure longitudinally and over cohorts. He highlights the possibility that Pupil Premium funding incentivised schools to sign up families who previously would have remained unregistered, thus contributing to an alteration of the compositions of the FSM/non-FSM groups, with implications for analyses of differences between the two over time. Gorard also finds that ‘temporary FSM-eligible pupils are closer in average attainment to the majority never-eligible pupils than to the permanently poor.’

This contrasts with Treadaway’s (2014) analyses, and the reasons for this contrast will be investigated during this project. Gorard concludes that, because over cohorts there have always been around 4% of pupils recorded permanently FSM-eligible over their years at school, to Year 11, this group provide the optimal stable construction of the ‘disadvantaged’: ‘This group of just over 4% of all pupils is largely unaffected by economic, political and legal changes. Therefore, we argue, they would have attracted Pupil Premium funding had it been available in any year, and under any conditions.’²⁷⁰

However, it is possible that the composition of the 4% has changed over the years and cohorts – so this does not entirely surmount issues of comparability and consistency over time. Gorard et al’s (2022) paper addresses this to some extent, however, by performing analyses accounting for GDP and GDP annual growth, and conditioning models for FSM children not only on other pupil characteristics, but on these national economic factors.²⁷¹

The National Foundation for Educational Research (NFER) (2022) build on Gorard and Treadaway’s analyses, looking recently at ‘pupils who became newly FSM eligible during the pandemic.’ They find ‘the attainment levels of the newly-eligible group are higher (although much closer) than the attainment of pupils who are already FSM.’ Their analyses also concur with both Gorard’s and Treadaway’s in finding that longer periods of recorded FSM eligibility are associated with lower average attainment. They highlight, however, ‘substantial variability in attainment, even among pupils who are FSM6.’

Once more this warns about extrapolating to the individual from the group average. The NFER also warn about interpreting trends according to FSM status at the school-level: ‘There is a large amount of statistical noise (e.g. small sample sizes, changing composition and circumstances of cohorts).’²⁷²

Summary

This section has considered key research and discussion on the validity of FSM as a measure and proxy for other pupil and family characteristics. It has considered studies examining associations of FSM with income-level and poverty, and research on the associations between FSM and other socio-economic indicators, family background characteristics, and area-level measures. It has examined

²⁶⁹Gorard, S. et al (2019) Ibid

Gorard, S. and Siddiqui, N. (2019) ‘How Trajectories of Disadvantage Help Explain School Attainment.’ <https://journals.sagepub.com/doi/full/10.1177/2158244018825171#:~:text=Using%20the%20number%20of%20years%20a%20student%20has%20been%20known,regions%20and%20of%20different%20types>.

²⁷⁰ Gorard, S. (2023) ‘Segregation and the attainment gap for permanently disadvantaged pupils in England.’ <https://www.tandfonline.com/doi/pdf/10.1080/00131911.2021.2007055>

²⁷¹ Gorard (2022) ‘Assessing the impact of Pupil Premium funding on primary school segregation and attainment.’ <https://www.tandfonline.com/doi/full/10.1080/02671522.2021.1907775>

²⁷² NFER (2022) ‘Investigating the changing landscape of pupil disadvantage’ <https://files.eric.ed.gov/fulltext/ED618981.pdf>

indications that propensity to be registered as FSM depends on area and group characteristics – thus belying the idea that FSM is entirely an individual-level measure. It has touched upon research on the predictive power of FSM, and explored work on trajectories and histories of FSM. The review highlights that what has been relatively less examined is changes over time, cohort, and place in the composition of the group denoted FSM – though potential variations are suggested when comparing studies using different datasets at different times. This will explicitly be explored during the rest of this project. Trajectories of FSM, and the predictive and compositional validity of different constructions of FSM histories will also be investigated, building on the existing body of research.

Section five: possibilities and next steps

The previous sections of this report have discussed the factors and processes underpinning families' registration for FSM and therefore the construction of the FSM measure in the National Pupil Database (NPD), highlighting key differences over time and place that may have impacted the composition of the groups of children recorded as FSM and non-FSM. The incompleteness of, error, and potential biases in the measure have been outlined. Intended, unintended, and wider consequences of the use of the FSM measure – particularly in Pupil Premium policy – have been discussed, alongside the ways in which concentrating on selected individual pupils identified through FSM sign-up may not be optimally efficient in tackling social disadvantage. The arguable insufficiency of FSM as a proxy for important aspects of family circumstance and as a predictor of pupil attainment has been evidenced.

This all raises the fundamental questions: (how) should FSM continue to be used in research and policymaking? Under what conditions is it a good or sufficient measure? What alternatives are there?

The answers to these questions depend on the use to which FSM or derived measures are being applied, and the function of the measures. FSM is put to many attempted uses, including: predicting attainment within the education system; identifying the most disadvantaged families and children within society; picking up and prioritising the pupils who may benefit most from additional resourcing and attention within the school system; channelling funding to schools most likely to serve deprived areas and under-resourced families; and monitoring how children conceived of as disadvantaged fare within education. Without radical overhaul of the whole system, as Ilie et al (2017) state, some 'reliable measurement of socio-economic deprivation is therefore essential.'²⁷³

'Gaps'

Monitoring the experiences and attainment of prioritised children classed as disadvantaged is a dominant use of the FSM measure. Differences between FSM/Number of times FSM/Pupil Premium pupils, and other pupils ('gaps') have concerned governments and researchers for decades.²⁷⁴

One possibility is to continue analyses of 'gaps' – but to be extremely careful in interpretations of what differences mean, particularly over time and place. For example, as can be seen from the evidence discussed throughout this paper, changes in FSM/non-FSM 'gaps' over time represent multiple aspects of children's lives and contexts. They show changes in the composition of the

²⁷³ Ilie, S. et al (2017) 'Revisiting free school meal eligibility as a proxy for pupil socio-economic deprivation.' <https://bera-journals.onlinelibrary.wiley.com/doi/abs/10.1002/berj.3260>

²⁷⁴ Parliament.uk (2023) 'PAC warns on 'lost decade' in education for disadvantaged children.' <https://committees.parliament.uk/committee/127/public-accounts-committee/news/195533/pac-warns-on-lost-decade-in-education-for-disadvantaged-children/#:~:text=Years%20of%20progress%20since%202012,it%20was%20before%20the%20pandemic.>
Gov.uk (2013) 'Closing the achievement gap.' <https://www.gov.uk/government/speeches/closing-the-achievement-gap>

Whitty, G. and Anders, J. (2014) "'Closing the achievement gap" in English cities and towns in the twenty-first century.' <https://discovery.ucl.ac.uk/id/eprint/1536095/1/UrbanEdFinalSub.pdf>
Bristol.ac.uk 'Closing the educational attainment gap.' <https://www.bristol.ac.uk/research/impact/social-sciences-law/soe/closing-educational-attainment-gap/>

FSM/non-FSM groups – which is interesting in itself, because it can tell us things about the direction of the welfare benefits system, and about tendencies to register as FSM-eligible and access support. They also show something about the impacts of government policy regimes – outside of education – on children from families registered as FSM-eligible.

They can point to issues with the way that children registered as FSM-eligible are being served by the education system – but the magnitude of the contribution of this component to variation in ‘gaps’ is largely unknown, and only part of a bigger picture. Therefore, care should be taken to avoid heavily attributing, without further scrutiny, ‘gaps’ and changes in or differences between ‘gaps’ to schools, local authorities, or particular initiatives or aspects of schooling, without discussing the nuances of what ‘gaps’ may represent.

Notwithstanding this overriding caveat, change over time and place in attainment and experiences of FSM/non-FSM pupils as recorded in the NPD are an established and simple way of exploring and representing how society, policy regimes, and education are serving pupils who may be classed as disadvantaged. Particularly as the transitional arrangements under Universal Credit impact the composition of the FSM/Pupil Premium group in a more obvious, mappable way, analysts have begun to consider how best to incorporate this change into longitudinal work, and whether and how ‘gaps’ can still meaningfully be researched.²⁷⁵

Previous work on trajectories of FSM through pupils’ school careers is also useful here, both in considering comparisons going forward, but also using historical data. As mentioned in Section four, Treadaway (2014) showed that, at least in the cohort he considered, children who were ever recorded FSM at a more distant point were more similar in attainment to those recorded Pupil Premium (who had been registered FSM within the past six years) than to those never recorded FSM. If this also holds in other cohorts (something we will investigate during this project), possibly an inclusive ‘ever-ever FSM’ measure (spanning all years in education) could provide a more consistent and stable representation of a more similar group.

This does not circumvent all the other issues of shifting eligibilities, wider context, and composition that will apply still to those ‘ever-ever’ registered FSM. And it would result in a larger group of children being classed as ‘disadvantaged.’ But there are several arguments against this being problematic. As Ilie et al (2017) highlight, ‘some characteristics of socio-economically disadvantaged families, such as low parental education levels, are persistent even if the parent moves into and out of (low-paid) employment.’²⁷⁶

The National Foundation for Educational Research (NFER) report, correspondingly, ‘The pupils who will benefit from the UC transitional arrangements are disproportionately likely to be from disadvantaged areas, and have lower attainment than their peers who are not eligible for FSM.’ They highlight how:

Some of the pupils who will be newly attracting PP funding from 2024/25 are pupils who have previously been eligible for FSM, but last met the eligibility criteria six or more years

²⁷⁵ Thomson, D. (2021) ‘How free school meal eligibility has been changing and why we might need new measures of disadvantage.’ <https://ffteducationdatalab.org.uk/2021/10/how-free-school-meal-eligibility-has-been-changing-and-why-we-might-need-new-measures-of-disadvantage/>

NFER (2022) ‘Investigating the changing landscape of pupil disadvantage.’ <https://files.eric.ed.gov/fulltext/ED618981.pdf>

²⁷⁶ Ilie, S. et al (2017) ‘Revisiting free school meal eligibility as a proxy for pupil socio-economic deprivation.’ <https://bera-journals.onlinelibrary.wiley.com/doi/abs/10.1002/berj.3260>

before. This suggests that the additional funding will be going towards pupils who are particularly likely to benefit from additional support.²⁷⁷

Pataro et al's (2020) assessment seems congruent with Ilie et al's: 'the concept of social disadvantage, like that of poverty, is inherently a longitudinal one... social disadvantage implies a prolonged situation of life with low levels of resources, restricting material consumption as well as social engagement.' And Boliver et al (2022) explain, 'the concept of socioeconomic disadvantage is relative as well as absolute, there is no hard boundary between the disadvantaged and non-disadvantaged.'²⁷⁸

If this relative disadvantage could better be picked up and acknowledged in uses of an 'ever-ever FSM' measure, perhaps it would provide a better and more valid comparison with a 'never-never FSM' group. Use of such a measure would avoid some of the issues of non-comparability introduced by the Universal Credit transitional arrangements, because it would not matter how long nor when a child was recorded FSM: just whether they ever were. It would allow comparisons in the future with 'ever-ever FSM' pupils of the past. It would not necessarily 'scupper any plans to distribute Pupil Premium funding more equitably.'²⁷⁹ However, it would underestimate the spectrum of differences and the steepest gradient between those always recorded FSM and never eligible. This will be explored further during the course of this project.

Spectrums rather than 'gaps'

Another alternative is to abandon reliance on a single binary 'gap' to represent the experiences of different groups of pupils within education and in attainment and to present a spectrum of differences based on different 'cuts' of times FSM. While again open to all the issues and caveats discussed previously, this could convey a more nuanced and therefore potentially more useful sense of unequal trajectories and chances. Treadaway (2017) highlighted how the relationship between FSM and attainment depends very much on how 'time FSM' is divided. As discussed earlier in this paper, examining Key Stage Four attainment between 2008 and 2016, Treadaway shows that the group of pupils recorded as eligible for FSM 90% or more of the time pull away from the rest. Their attainment fell, relative to the average, whereas that for children recorded FSM for fewer years rose.²⁸⁰

This presents a very different picture to the general sense of a narrowing gap at this stage over the same years and highlights how analytical choices impact findings.²⁸¹

Relatedly, possibilities for continued use of the FSM measure, in some form, to track children's changing outcomes lie with decisions regarding its comparator group – and indeed whether a comparator should be used at all. Some analysts have taken the approach of treating the FSM group

²⁷⁷ NFER (2022) 'Investigating the changing landscape of pupil disadvantage.'

<https://files.eric.ed.gov/fulltext/ED618981.pdf>

²⁷⁸ Boliver, V. et al (2022) 'Who counts as socioeconomically disadvantaged for the purposes of widening access to higher education?' <https://www.tandfonline.com/doi/full/10.1080/01425692.2021.2017852>

²⁷⁹ Thomson (2021) 'How free school meal eligibility has been changing and why we might need new measures of disadvantage.' <https://ffteducationdatalab.org.uk/2021/10/how-free-school-meal-eligibility-has-been-changing-and-why-we-might-need-new-measures-of-disadvantage/#:~:text=It%20has%20been%20rolling%20out,income%20threshold%20was%20henceforth%20imposed>

²⁸⁰ Treadaway, M. (2017) 'Long-term disadvantage, part one: Challenges and successes.'

<https://ffteducationdatalab.org.uk/2017/07/long-term-disadvantage-part-one-challenges-and-successes/>

²⁸¹ E.g. <https://epi.org.uk/publications-and-research/annual-report-2023/>

as a distinct, defined group of interest – those who are eligible for and who have registered for FSM, under current conditions – and reporting findings for them with reference to the average, including themselves, rather than non-FSM (as Treadaway, above), or with no explicit comparison at all.²⁸²

Boliver et al (2022) make the point that using FSM does not usually result in ‘false positives’ – children in the FSM group, denoted as such, have generally met the criteria for inclusion – though it is not comprehensive, and its inclusivity varies by area and family characteristics. In the context of prioritising pupils in university admissions, they argue therefore for the use of FSM, and for the: ‘greater importance of minimising the rate of false positives than of minimising the rate of false negatives.’²⁸³ That is, they argue that capturing with certainty a sub-group of children who are disadvantaged is, on balance, adequate, even though some pupils are missed out. The extent to which this holds in the pre-higher education context, for FSM’s uses at the school stage, will be considered during this project.

Alternatives to FSM for measuring ‘gaps’

Other measures of family circumstance

In 2022, The National Foundation for Educational Research (NFER) published analyses and subsequently convened a roundtable to consider how, going forward, ‘we can hold the Government to account for progress in reducing the gap and improving outcomes of pupils from economically disadvantaged backgrounds.’²⁸⁴ Their resulting report lays out a number of suggestions, considers their strengths and weaknesses, and then makes several recommendations for research concerned with measuring progress in narrowing of differences in attainment across groups of children more and less disadvantaged.

One recommendation is that, ‘The Government should explore the feasibility of introducing a ‘continuity measure’ of disadvantage from 2024 onwards. This would be based on the underlying eligibility criteria for FSM, and remove the effect of the transitional arrangements.’ That is, it would ‘only identify pupils as disadvantaged if they actually met the underlying eligibility criteria for being considered as disadvantaged at that given point in time.’ This would provide some consistency of measurement, if feasible – but the practicalities of gaining the information for each child remain to be explored.

Another recommendation is that, ‘The Government should explore the feasibility of establishing a household income-based measure of disadvantage for the future.’ This chimes with the Social Mobility Commission’s suggestion that ‘family linking,’ including of ‘tax records of parents and

²⁸² Kelsair, F. and McNally, S (2009). ‘Special Educational Needs in England: Final Report for the National Equality Panel.’

https://www.researchgate.net/publication/242211473_Special_Educational_Needs_in_England_Final_Report_for_the_National_Equality_Panel

Campbell, T. (2023) ‘Inequalities in provision for primary children with special educational needs and / or disabilities (SEND) by local area deprivation.’ <https://sticerd.lse.ac.uk/dps/case/cp/casepaper231.pdf>

²⁸³ Boliver, V. et al (2022) ‘Who counts as socioeconomically disadvantaged for the purposes of widening access to higher education?’ <https://www.tandfonline.com/doi/full/10.1080/01425692.2021.2017852>

²⁸⁴ NFER (2022) ‘Investigating the changing landscape of pupil disadvantage.’

<https://files.eric.ed.gov/fulltext/ED618981.pdf>

Sharp, C. et al (2023) ‘Measuring pupil disadvantage: The case for change.’

<https://www.nfer.ac.uk/publications/measuring-pupil-disadvantage-the-case-for-change/>

children’ would be beneficial, as well as a recommendation of the Education Policy Institute (2023) that:

The DfE should...make available centrally held data linking family income to pupil-level attainment, given that Universal Credit protections will continue to affect who is considered disadvantaged based on FSM eligibility.’²⁸⁵

As laid out in NFER’s report, this could potentially ‘provide a more direct and accurate measure of disadvantage for a range of purposes...with the added benefit of capturing information on the extent of disadvantage experienced by each pupil.’ It would not suffer from the drawbacks of FSM’s blunt, binary nature, which, as detailed throughout this report, include both a lack of ability to distinguish families across the income spectrum and an over-simplistic narrowing of focus onto the FSM-denoted group as though they are distinct, homogenous, and unique from the gradient.

In terms of practicalities, the NFER suggest that:

Changes in legislation in recent years, such as the Digital Economy Act (GB. Parliament. HoC, 2017), should make it possible to share this information across government departments.

However, as noted earlier in this paper, the Department for Education first consulted on initial analyses using linked HMRC-NPD data in 2017, then failed to publicly react to consultation responses until 2022 – five years later, stating that ‘further revisions to strengthen the proposed methodology’ are still taking place.²⁸⁶

It is unclear when this dataset may be available for use within or outside of government, and no details on the new methodology or findings about the validity, strengths or weaknesses of the Pupil Parent Matched Data is yet available. The feasibility and utility of this suggestion and others using linkage will continue to be explored during the deliberative stage of the current project.

In the meantime, it is useful to flag further considerations raised by NFER. Such data would ‘Depend on access to DWP data and require resources to construct;’ ‘There may be insurmountable challenges in identifying household income data;’ and there would probably be a ‘Time-lag in obtaining the most recent data.’ The NFER also highlight that any unidimensional measure relying solely on income would not account for other causes of poverty (and nor would it portray wealth, (in)security, or other aspects of resources and other family circumstances).

Given this unidimensionality, the NFER also consider the possibility of matching further data to better understand the circumstances of pupils in the NPD: ‘the construction of a household-level dataset would also provide an opportunity to generate insights into the impact of other household

²⁸⁵ Social Mobility Commission (2022) ‘Data for social mobility: improving the collection and availability of data across government.’

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1124010/Data_for_Social_Mobility.pdf

Hunt, E. (2023) ‘EPI Annual Report 2023.’ <https://epi.org.uk/publications-and-research/annual-report-2023/>

²⁸⁶ Department for Education (2017) ‘Analysing family circumstances and education.’

[https://consult.education.gov.uk/school-leadership-analysis-unit/analysing-family-circumstances-and-education-1/supporting_documents/Analysing%20family%20circumstances%20technical%20consultation%20document.p](https://consult.education.gov.uk/school-leadership-analysis-unit/analysing-family-circumstances-and-education-1/supporting_documents/Analysing%20family%20circumstances%20technical%20consultation%20document.pdf)
[df](https://consult.education.gov.uk/school-leadership-analysis-unit/analysing-family-circumstances-and-education-1/)

Department for Education (2022) ‘Analysing family circumstances and education: Feedback updated 7 Sep 2022.’

<https://consult.education.gov.uk/school-leadership-analysis-unit/analysing-family-circumstances-and-education-1/>

factors on the relationship between family income and education outcomes. For example, researchers could use this data to investigate the relationship between household access to area-based services (such as health, housing and social services) and education outcomes.’

Extending this further, NFER also moot the possibility of a detailed dataset with, ‘Broader measures of socio-economic disadvantage (e.g. parental education, parental occupation, household possessions, access to basic necessities).’ While emphasising that such data would be, ‘Robust and meaningful,’ with the ‘Potential to select measures with greater comparability over time’ and a ‘More valid and accurate reflection of pupil disadvantage,’ they suggest this would be ‘Difficult and costly to collect’ and that it is ‘not recorded in administrative databases and would only be available for a sample.’²⁸⁷ However, whether and the extent to which this would be problematic depends on uses and expectations of the data. Again, this will be explored further as this project progresses.

Siddiqui and Gorard (2023) also flag pragmatic and ethical consideration regarding the use of linked data:

The point is moot unless or until widespread individual/household income data is available ...linked income for individuals/households is an understandably sensitive issue for many citizens, and this is perhaps the greatest barrier to the use of income data for the purposes described. If FSM, taken to mean above or below a poverty line, is not accurate enough, and precise income details are too sensitive for widespread use, perhaps the next step for research is to decide on the best level of aggregation somewhere between these two extremes, that maximizes utility while minimizing risk.’²⁸⁸

Returning to the NFER’s consideration of a richer, household-level dataset, the British Educational Research Association (BERA) have also suggested that a more transformational approach to monitoring ‘gaps’ and tracking the experiences of children living in more and less advantaged circumstances within the education system is a sample survey. BERA argue that for many purposes within educational research and policymaking, a survey with better measures would lend itself to higher-quality analysis, understanding, and policymaking. Their (2021) paper proposes:

A longitudinal sample of pupils, using the national pupil database (NPD) as a sampling frame, from whom additional data will be collected using a combination of assessment instruments and pupil/teacher/parent survey data. This combination of data will facilitate a richer exploration of educational processes and outcomes than the current system allows.’²⁸⁹

BERA also suggest that such an endeavour, if implemented well, could lead to:

...existing census-based annual testing (including SATs) of the whole school population in the primary and early years sectors [being] phased out, saving pupil and teacher time, eliminating negative side-effects and reducing costs.

²⁸⁷ Sharp, C. et al (2023) ‘Measuring pupil disadvantage: The case for change.’

<https://www.nfer.ac.uk/publications/measuring-pupil-disadvantage-the-case-for-change/>

²⁸⁸ Siddiqui, N. and Gorrard, S. (2023) ‘Is household income a reliable measure when assessing educational outcomes? A Jigsaw of two datasets (Next Steps and National Pupil Database) for understanding indicators of disadvantage.’

[https://www.tandfonline.com/doi/full/10.1080/1743727X.2022.2094359#:~:text=The%20point%20is%20moot%20unless,\(Gorard%20and%20Siddiqui%202019\).](https://www.tandfonline.com/doi/full/10.1080/1743727X.2022.2094359#:~:text=The%20point%20is%20moot%20unless,(Gorard%20and%20Siddiqui%202019).)

²⁸⁹ <https://www.bera.ac.uk/publication/high-standards-not-high-stakes-an-alternative-to-sats>

It is also possible that such a longitudinal sample survey could address some of the ethical and practical concerns raised by Siddiqui and Gorard (2023), were it implemented sensitively and securely with sufficient time and investment, and experienced field researchers and administrators.

Detailed household-level data could also circumvent one of the main limitations of unidimensional, income-based alternatives to FSM: that they cannot fully proxy or represent marginalised groups and children at risk of depressed experiences and outcomes, to whom more attention should arguably be paid within policymaking and schools. This includes, ‘children from single parent and large families; children from some ethnic minority groups...children with parents with drug/alcohol dependency problems [and other mental ill-health]; and children with a disabled parent ([and/or] caring responsibilities.’²⁹⁰

Importantly, survey data could also more directly collect information on educational and related activities within children’s homes and environments, as well as parent/carer education level, and the interactions between these things and other family and area characteristics. Therefore, it could more directly emphasise and bring to policymakers’ attention information on the link between these factors and attainment within schools, and what compensatory or complementary interventions are needed – across the social policy spectrum.²⁹¹

Area-level measures

Area-level measures (including deprivation metrics like the Income Deprivation Affecting Children Index [IDACI], and information from the national census) have been proposed and implemented as an alternative for some of the uses to which FSM is put, including more heavily targeting schools for additional resources, and measuring the experiences of children living in different contexts.²⁹² Though this can result in inefficiency – for example, because many high-deprivation schools also educate more advantaged children (Allen, 2010), as Syles et al (2008) highlight, area measures can provide some avoidance of FSM’s downsides.²⁹³ These include its dependence on registration as FSM eligible, lack of nuance and gradation, and lack of information on the context and conditions within which a child lives, which impacts their experiences and outcomes.

On the other hand, these local conditions impact children differentially depending on their immediate family context – which is not picked up by area-based measures (though, nor is it fully picked up by FSM). Many area-based measures also contain time lags: the census takes place each

²⁹⁰ Vizzard, P. et al (2018) ‘Child poverty and multidimensional disadvantage: Tackling “data exclusion” and extending the evidence base on “missing” and “invisible” children.’

<https://sticerd.lse.ac.uk/dps/case/cr/casereport114.pdf>

²⁹¹ Ross, A. et al (2020) ‘Examining the London advantage in attainment: evidence from LSYPE.’

<https://www.gov.uk/government/publications/examining-the-london-advantage-in-attainment-evidence-from-lsype#:~:text=Details,of%20factors%20than%20previous%20studies>

²⁹² Crawford, C. and Greaves, E. (2013) ‘A comparison of commonly used socio-economic indicators: their relationship to educational disadvantage and relevance to Teach First.’

https://ifs.org.uk/sites/default/files/output_url_files/r79.pdf

Styles, B. (2007) ‘Moving on from free school meals: national census data can describe the socio-economic background of the intake of each school in England.’

<https://www.tandfonline.com/doi/abs/10.1080/00131880801920387>

²⁹³ Allen, B. (2010) ‘Why give free school meals to pupils who are not eligible?’

<https://rebeccaallen.co.uk/2010/06/11/free-school-meals/>

decade, and the IDACI is reassessed and re-baselined at intervals ranging from three to five years – lending inaccuracy if the composition of an area changes in the meantime.²⁹⁴

The extent to which this is problematic, like many aspects of the discussion here, comes down to the judgements of researchers and policymakers: Crawford and Greaves (2011) cite an advantage of the IDACI as its being ‘updated regularly’ – though, during the noughties period they consider, the lag is smaller than in the next decade, at three years.²⁹⁵ Crawford and Greaves also highlight the IDACI’s strength in pertaining directly to families with children, though they warn that it only captures one aspect of local families’ lives: income deprivation.

Alternatives to ‘gaps’ – distributional measures

In research and analysis concerned with examining how groups of children from families who may be conceived of as disadvantaged and under-resourced are faring within society, there are therefore some arguments for the continued use of FSM as a measure, in some form. In research concerned with investigating whether the education system in itself is an equalising force conferring opportunity and improving life chances – rather than stratifying and dividing – distributional measures are one way in which FSM can be used, as opposed to or in addition to conveying simple binary ‘gaps.’

As illustrated by Andrews et al (2017) and The Department for Education (2015), describing the spread of attainment across all pupils according to different characteristics can be more informative and interesting than concentrating on averages.²⁹⁶ This returns to Allen’s (2018) point: ‘group means mask the extent to which pupil premium students are almost as different from each other than they are from the non-pupil premium group of students.’²⁹⁷

To more fully understand how the education system is functioning, and therefore to inform better policymaking, appraisal of the full spectrum of children’s experiences, and the composition of the groups of students at different parts of the distribution, and comparisons of this over time and place may be helpful. Are there extreme ‘winners’ and ‘losers?’ Who are they? What do they have in common, in terms of observed characteristics, and how do they seem to be different?

This is particularly important as an approach to understanding the workings of the education system itself, and how different groups of pupils are being served, because assessment and attainment regimes force necessary stratification of pupils and ensure that ‘gaps,’ and ‘winners’ and ‘losers’ must exist. This is because assessments are not simple criterion-based, but impose a distribution, and because decisions about curriculum content and what ‘counts’ in accountability and monitoring

²⁹⁴ Styles, B. (2007) Ibid

²⁹⁵ Crawford, C. and Greaves, E. (2013) Ibid

²⁹⁶ Andrews, J. et al (2017) ‘Closing the gap? Trends in educational attainment and disadvantage.’

https://epi.org.uk/wp-content/uploads/2017/08/Closing-the-Gap_EPI-.pdf

Department for Education (2015) ‘SFR 47/2015, 10 December 2015.’

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/483897/SFR47_2015_text.pdf

²⁹⁷ Allen, B. (2018) ‘The pupil premium is not working (part I): Do not measure attainment gaps.’

<https://rebeccaallen.co.uk/2018/09/10/the-pupil-premium-is-not-working/>

regimes can impact pupils' trajectories and widen inequalities.²⁹⁸ In itself, this is worth exploring – particularly according to its effect on different groups of pupils.

As Ogden et al (2022) state, 'the desirable distribution of educational outcomes across areas and schools is also a subjective question, bound up with the level of inequality one is willing to accept in society.'²⁹⁹ They also reiterate: 'one cannot close educational inequalities through the education system alone. They will, to some extent, always reflect the wider inequalities in society and access to different levels of parental investments' – which returns to the point that the place of different pupils within the distribution should, like 'gaps,' not be attributed causally or solely to schools or the education system.

Funding structures and Pupil Premium

As described earlier in this paper, FSM is used both to weight for deprivation in other funding formulas and to channel money and attention to children recorded as FSM and therefore Pupil Premium. Various issues were raised by the evidence – that despite this, overall funding levels, particularly for disadvantaged schools, have fallen; that the identification and targeting of children as 'Pupil Premium' may not be effective and, in fact, can have unintended consequences; and that the emphasis through continuation of the Pupil Premium on the individual pupil and schools may plausibly serve as distraction from wider social issues, conditions, and policies that can support or be detrimental to families and children's life chances – though that is not in any way to say that it should be discontinued without proper consideration of alternative means of targeting disadvantage and unmet need. These issues and potential options will be explored further during the deliberative strand of our project.

Summary

This section has begun to consider some of the ways in which uses of the FSM measure can further be explored and improved, and to highlight existing work on alternatives and complements. Informed by the evidence throughout this report, the empirical analyses to come, and the deliberative section of this project, this will be continued in order to recommend possibilities.

²⁹⁸ Gov.uk 'Understanding scaled scores at key stage 2.' <https://www.gov.uk/guidance/understanding-scaled-scores-at-key-stage-2>

Ofqual (2018) 'Grading new GCSEs.'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/719124/Grading_new_GCSEs25.6.2018.pdf

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Wallace, M. (2023) 'Trends in Adolescent Disadvantage Policy and Outcomes for Young People under Labour, the Coalition, and the Conservatives (1997 to 2019).' <https://sticerd.lse.ac.uk/dps/case/spdo/spdorp15.pdf>

²⁹⁹ Ogden, K. et al (2022) 'Does funding follow need? An analysis of the geographic distribution of public spending in England.' <https://ifs.org.uk/publications/does-funding-follow-need-analysis-geographic-distribution-public-spending-england>

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