

[redacted]

From: John Edward <john.edward@scis.org.uk>
Sent: 21 November 2017 17:54
To: [redacted]; [redacted]
Cc: [redacted]; [redacted]; [redacted]
Subject: RE: SCIS meeting 24 Oct- draft note
Attachments: Charitable benefit nov17 Glenalmond.pdf

[redacted]

Another school has just posted its most recent charity report - <http://www.glenalmondcollege.co.uk/about-us/charity-report/> (also attached)

It helps make the point about the range of activity that it undertakes in the space that charitable status provides and on the assumption of relief as a result.

As well as the means-tested assistance, these are many of the other activities that schools will receive no relief for undertaking, and therefore will be under threat from budget changes.

Kind regards

John



John Edward
Director



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From: [redacted]@gov.scot [mailto:[redacted]@gov.scot]
Sent: 14 November 2017 08:54
To: John Edward; [redacted]@gov.scot
Cc: [redacted]@gov.scot; [redacted]@gov.scot; [redacted]@gov.scot
Subject: RE: SCIS meeting 24 Oct- draft note

Morning John,

The Times did not approach SG for its position or any comment before publishing the article.
No decision has been made.

Thanks
[redacted]

From: John Edward [mailto:john.edward@scis.org.uk]

Sent: 13 November 2017 17:39

To: [redacted] ; [redacted]

Cc: [redacted] ; [redacted] ; [redacted]

Subject: RE: SCIS meeting 24 Oct- draft note

Dear All

I will continue to pass on any data that might be useful, in the hope that yesterday's press reports do not indicate that a decision has been made regardless.

One assumption has been that the cost per pupil is relatively small and therefore acceptable. One smaller school, which has restructured in recent years, was in touch today to say that the rates rise would be equivalent to £500/year. That is comfortably enough to dissuade some of their parents from continuing with the school.

Kind regards

John



John Edward
Director



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From: John Edward

Sent: 10 November 2017 13:32

To: [redacted] gov.scot'; [redacted] @gov.scot

Cc: [redacted] @gov.scot; [redacted] @gov.scot; [redacted] @gov.scot

Subject: RE: SCIS meeting 24 Oct- draft note

Dear All

One question asked at our recent meeting was affordability.

An independent firm that reported to our heads recently has agreed to let me pass on the attached presentation on affordability. The later example of the large northern school is the nearest equivalent to the Scottish situation (compared to the south of England).

While the issue of affordability is one for the schools, sudden changes in the budgetary assumptions they operate on are not.

Of course, no English school is required also to provide a legally-tested level of means-tested widening access bursaries, or other facility and staff provision, from the existing parental income.

I am struck by just how little post-legislative scrutiny or awareness there is generally of the OSCR process and its effect on schools since 2006. At least £20million more provision is means-tested annually, rather than on ability, than was available before the test was put in place. The 80% increase in the rates relief that makes that possible for schools will, without doubt, narrow access again. How that sits legally with the 2005 Act remains to be challenged.

Many thanks

John



John Edward
Director



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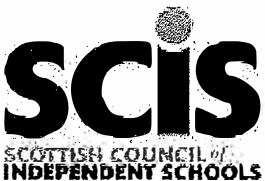
From: [redacted]@gov.scot [mailto:[redacted]@gov.scot]
Sent: 25 October 2017 13:23
To: John Edward; [redacted]@gov.scot
Cc: [redacted]@gov.scot; [redacted]@gov.scot; [redacted]@gov.scot
Subject: RE: SCIS meeting 24 Oct- draft note

Thank you

From: John Edward [mailto:john.edward@scis.org.uk]
Sent: 25 October 2017 13:16
To: [redacted]; [redacted]
Cc: [redacted]; [redacted]; [redacted]
Subject: RE: SCIS meeting 24 Oct- draft note

Further to this, one school in Glasgow has just sent me the list of their current community lets for schools and sports facilities, by way of a guide of the level of wider assistance beyond fee assistance.

John



John Edward
Director



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From: [redacted]@gov.scot [mailto:[redacted]@gov.scot]
Sent: 24 October 2017 20:53
To: John Edward; [redacted]@gov.scot
Cc: [redacted]@gov.scot; [redacted]@gov.scot; [redacted]@gov.scot
Subject: SCIS meeting 24 Oct- draft note

John/ [redacted] ,

Please see draft notes to capture the key points from our meeting this afternoon. I've tried to keep this succinct and would propose to circulate it to Mr Mackay along with the SCIS submission (and independent economic impact report). Apologies for any typos- I will hopefully pick most of these up when I re-read tomorrow on a larger screen..

I'm happy to take on board any amends that you may have. However, I'm on leave from tomorrow for 2 weeks but have copied in colleagues who can assist and I'd be grateful if you could copy them into any comments

Meeting with SCIS to discuss Barclay recommendation to remove business rates relief entitlement for independent schools

- Barclay recommendations are contradictory. While the report recommends that charity relief should be retained for the university properties that primarily deliver the core function of education, independent schools core functions are singled out. Additionally other restrictive membership, fee based institutions such as royal colleges (GP's, surgeons etc.) charitable institutions were not considered for reform by Barclay
- It is unclear why Barclay has settled on only a handful of charities out of tens of thousands and in particular those which have been subject to probably the most extensive charity testing in Scotland, if not the whole of the UK (/the English speaking world?)
- Scotland has the lowest independent fees in GB [**Action**- JE to provide figures] meaning it offers a competitive product internationally.
- Independent pupil numbers are in decline [**Action** -JE to provide figures] and are at their lowest recorded level
- Most (all?) independent schools offer bursary places and will generally commit to give financial assistance to a pupil for up to 6 or 7 forward years. S1 parents and pupils will have just begun the academic year on the assumption that assistance will be available until they complete their education. The total value of bursaries is worth around £47 million per year (with £31 m of that being means tested support with the balance being non-means tested support awarded for scholarships for academic excellence and targeted support to Forces families, widows etc.)
- There is some evidence that, for parents, affordability is the key issue in deciding whether to send children to independent schools and if just 5% of parents remove their children from the independent schools the resulting increase in education costs to the state could easily negate the estimated £5 million savings
- Schools have a limited number of options to recoup the additional cost. (While some schools have modest reserves, these could not cover the ongoing annual costs)

-Fees could be increased (which may lead to parents removing children from schools, increasing eth burden on state schools)

- Assets could be sold- most likely playing fields. However this would limit/remove the use of facilities by local communities and would only provide a one-

off windfall, whereas the rates burden would be ongoing so would be a short term fix only (**Not explicitly discussed, but is this relevant?**)

-reduce means tested bursaries and community offer, which risks failure of the charity test and some schools founding charters./principles would prevent them from taking this route. If schools do chose this route it simply makes the whole system more elitist

- A small number of schools have been struggling for the past few years- for example due to the oil downturn- and to levy rates could result in closure which would increase the burden on local State schools (although this is far less likely to occur for international pupils). This is not thought to be wide spread but could have significant consequences for some councils.
- Special schools are of particular concern and some special schools that are currently in receipt of charity relief are likely to fail to meet the current criteria to qualify for disabled person relief (this is most likely for facilities that specialise in complex social or educational needs, rather than physical disabilities) and the consequential impact on some of the most vulnerable children in society is unknown.

[redacted]

Secretary to Barclay Review

3G North, Victoria Quay, EH6 6QQ

Scottish Government

tel: 0131 244 [redacted]

[redacted] @gov.scot

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Tha am post-d seo (agus faidhle neo ceanglan còmhla ris) dhan neach neo luchd-ainmichte a-mhàin. Chan eil e ceadachd a chleachdadh ann an dòigh sam bith, a' toirt a-steach còraichean, foillseachadh neo sgaoileadh, gun chead. Ma 's e is gun d'fhuair sibh seo gun fhiosd', bu choir cur às dhan phost-d agus lethbhreac sam bith air an t-siostam agaibh agus fios a leigeil chun neach a sgaoil am post-d gun dàil. Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

[REDACTED]

From: [REDACTED]
Sent: 27 November 2017 11:30
To: [REDACTED]
Subject: FW: Independent School Sector & Insight

From: [REDACTED]
Sent: 21 November 2017 18:45
To: John Edward
Cc: [REDACTED]
Subject: RE: Independent School Sector & Insight

Thanks John. Appreciate the update
 Kind regards
 [REDACTED]

From: John Edward [<mailto:john.edward@scis.org.uk>]
Sent: 21 November 2017 17:48
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: Independent School Sector & Insight

[REDACTED]

Apologies for not getting back sooner, but the Barclay Review is taking up a lot of our time and attention, as well as prompting thinking about other areas.

Will be in touch soon

John

John Edward
 Director



[REDACTED]



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From: [REDACTED]
Sent: 31 October 2017 11:03
To: John Edward
Cc: [REDACTED]
Subject: RE: Independent School Sector & Insight

John

Apologies for the delay in coming back to you. A combination of leave and work volume are to blame.

From reading through your responses to date I think, for absolute clarity, it would be helpful if you could confirm against the pupil census table I forwarded in my email of 31 August (reattached) the data that you hold at pupil level so we have a shared understanding of where the gaps currently exist. I have also referred to schedule 2 of The Registration of Independent Schools (Scotland) Regulations 2006 as you suggested, but this confirms the data provision requirement to Scottish Government is limited to the number of pupils in the school arranged by their year of birth, their sex and whether they are day or boarding pupils.

It is also not clear to me from your response below whether your offer to introduce a census is intended to capture the missing information that is required and when you would be looking to introduce such an approach. Are you able to clarify?

I look forward to hearing back from you

Kind regards

From: John Edward [mailto:john.edward@scis.org.uk]

Sent: 04 October 2017 13:11

To: [REDACTED]

Cc: [REDACTED]

Subject: RE: Independent School Sector & Insight

Dear [REDACTED]

Apologies for the time it has taken to get an initial response together.

The core issue here is the gap since our involvement in three Scottish Government data collections/publications was discontinued for us in 2010-11. These were the Independent Schools Census, the reporting of SQA exam results (which we now receive), and in a limited way, the reporting of leavers' destinations. At the time the then school Handbook was changed, there was no decision to include the sector – although subsequently we were asked to (re)encourage collections for PISA, SSLN at the time etc; legislation for GTCS registration; and so on.

That means there is a substantial cohort in Scotland for whom no central data exists on leaver destination, ASN, SIMD decline, literacy & numeracy. We can endeavour as a body to collect our own census data, see below, but ethnic background/ SIMD, etc are not something we compile – and below N4 no schools outside of the special schools will have other SCQF levels to report. SIMD type data will form part of means-tested assistance applications only, unless there are other carer responsibilities or the like.

So – to reflect the pupil cohort across Scotland – this probably needs a new, semi-formal census, or else an agreement that the information is limited (to SQA centres for instance) and applies only to those independent schools in membership of SCIS. Otherwise, we have the recent experience of the Education Act requiring full GTCS registration, which showed that neither the government nor the GTCS had full data on how many potential teachers the proposed legislation was designed to cover.

The SCIS annual census gathers:

- Pupil numbers per year – in childcare, pre-school, and P1-S6
- Examinations offered and level
- Teacher numbers (FTE) – by gender
- Support staff number – by gender
- Some financial assistance outline figures
- Leaver destinations – numbers to HE (Scotland), (rUK), (EU), (Rest of world); FE; other
- International day pupil numbers

- International boarding numbers by country
- Fee levels
- Special schools also list nature of care and education provided, placement weeks, ASN reasons

From the SQA we also receive:

- Centre #
- Centre name
- SCN
- Forename surname
- gender
- estage
- qual #
- qual title
- level
- result

So that actually covers much, is not quite all, of what is on your technical spec. But again, not all of our pupils will be doing SCQF/SQA, not all – even day pupils, will be from Scottish addresses, and we do not have 100% of all the independent pupils (>98%).

I would have to check with each school to what extent – if any – they have other SCQF attainment data beyond N1-AH/SB.

I'd be happy to speak to WCBS to see if there was a way in which data could be matched to SEEMIS etc.

On SNSA – several mainstream and special schools have already expressed an interest – so it would be worth a wider discussion with them.

Many thanks

John



John Edward
Director



www.scls.org.uk



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From: [Redacted]
Sent: 31 August 2017 16:36
To: John Edward
Cc: [Redacted]
Subject: Independent School Sector & Insight
Importance: High

John

My thanks to yourself [REDACTED] for attending Victoria Quay on Tuesday to explore inclusion of the Independent School sector within the Insight Senior Phase Benchmarking Tool.

I used the opportunity to talk you through the data building blocks that would be needed to allow Insight to meaningfully benchmark the independent sector. I also emphasised the importance of the sector as a whole being committed to inclusion within the tool. The three key data sets required cover Pupil characteristics, Attainment data (linked to the Scottish Candidate Number and including SQA and wider qualifications) and Leaver Destinations data.

(i) Pupil Census

As agreed, I attach an extract from the insight technical pages setting out the pupil level data that would be required. You agreed to confirm this data is held for all independent school learners and to highlight any variations or gaps that exist.

(ii) Attainment

You kindly agreed to confirm the range of wider SCQF accredited attainment data that is gathered beyond the annual SQA data set that all independent schools currently receive.

(iii) Leaver Destinations

Subject to there being a match with (i) and confirmation of the detail at (ii) I agreed to set up a meeting with my SG policy colleagues to explore what mechanisms may be needed to capture leaver destination data for feeding into the Skills Development Scotland Customer Management System. It is this system that underpins the monitoring of all state school leavers across Scotland. Leavers are defined by those who have left school between pupil census day (year x) and pupil census day (year x+1).

Finally, we briefly discussed the Scottish National Standardised Assessments (SNSA), which I confirmed are to be used to inform teacher professional judgements on individual learners achievement of Curriculum for Excellence levels at the P1, P4, P7 and S3 stage. I also confirmed the current contract with ACER to deliver SNSA is limited to the state school sector.

I trust this an accurate reflection of our discussion and I very much look forward to hearing back from you in due course.

Kind regards

[REDACTED]

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For each of the measures presented in the tool, it is possible to apply filters to explore the data based on underlying pupil characteristics. These filters are based on data from the Pupil Census, matched to the school leavers collection, leaver destinations and attainment data.

When using filters, the filter selected applies to all of the cohorts except the virtual comparator considered by the measure. For example, by selecting those pupils with English as an additional language (EAL) as a filter, the selection will display the result for

- those pupils in the target school with EAL;
- the pupils from the virtual comparator who are matched to the pupils in the target school with EAL. So when the EAL filter is applied, the pupils in the virtual comparator may or may not have EAL themselves but will match their target pupils on other factors;
- those pupils in the LA with EAL;
- those pupils nationally with EAL.

It is possible to apply filters individually or in combination, for example, restricting the results to 17 year olds with additional support needs and a minority ethnic background. However, the tool will suppress results for cohorts smaller than 5 pupils and the more filters that are applied, the greater the likelihood that results will be suppressed.

Core cohorts are those based on the gender and stage filters. If any other filter is applied then this is a non-core cohort and the measures are produced on demand rather than being pre-calculated.

The following table provides more detail on each individual filter:

Filter	Options	Description	Held by Independent Sector Y/N
Age	<ul style="list-style-type: none"> • All • Under 16 • 16 • 17 • 18 • Over 18 	This filter is based on the pupil's age as at the end of February in the given academic year, as calculated from information in the Pupil Census (conducted annually in September).	
ASN (Additional Support Needs)	<ul style="list-style-type: none"> • All • ASN • Other 	This filter is based on the Pupil Census records for the year being considered. If a pupil has one or more student need records in the year then the candidate is recorded as having additional support needs. Selecting ASN as your filter will restrict the results to only those pupils who have been recorded as having additional support needs. Selecting Other will restrict the results to those pupils who are not recorded as having additional support needs.	
EAL (English as an Additional	<ul style="list-style-type: none"> • All • EAL • Other 	This filter is based on the Pupil Census records for the year being considered. Selecting EAL as your filter will restrict the results to only those pupils who have been recorded as having English as an additional language.	

Language)		Selecting Other will restrict the results to only those pupils who are not recorded as having English as an additional language.	
Ethnicity	<ul style="list-style-type: none"> • All • White • Minority Ethnic • Not Known 	This filter is based on the latest Pupil Census for the year being considered. The filter can be used to restrict the results to only those pupils whose ethnicity is white, minority ethnic or not known.	
Gender	<ul style="list-style-type: none"> • All • Male • Female 	This filter is based on the pupil's gender as at the latest Pupil Census (conducted annually in September).	
Highest SQCF Attained	<ul style="list-style-type: none"> • Any • 1 • 2 • 3 • 4 • 5 • 6 • 7 	This filter is based on SQA and wider achievement provider attainment data which makes it possible to identify the highest SCQF level attained by each pupil.	
LAC (Looked After Status)	<ul style="list-style-type: none"> • Any • Looked after at home • Looked after away from home • All looked after 	This filter is based on the Pupil Census records for the year being considered. Selecting 'Looked after at home' as your filter will restrict the results to only those pupils who have been recorded as having a looked after status, who are looked after at home. Selecting 'Looked after away from home' as your filter will restrict the results to only those pupils who have been recorded as having a looked after status, who are looked after away from home. Selecting 'All looked after' as your filter will restrict your results to all pupils who have a looked after status.	
Leaver Destination	<ul style="list-style-type: none"> • Any • Positive 	<p>This filter is based on Skills Development Scotland's School Leaver Destination Report. Selecting 'Positive' as your filter, restricts the results to only those school leavers who have been recorded as having a positive destination. A positive destination includes Higher Education, Further Education, Training, Voluntary Work, Employment and Activity Agreements. Further information on these categories can be found in the background notes to the 'Summary Statistics for attainment, leaver destinations and healthy living' National Statistics publication: http://www.scotland.gov.uk/Publications/2013/06/7503/8</p> <p>The filter is available for all measures except the national dashboard measure on school leaver destinations.</p>	
Pupil Points	<ul style="list-style-type: none"> • Any • National • Lowest 20% • National 	This filter is based on SQA and wider achievement provider attainment data. For each pupil it is possible to calculate their total tariff points, based on the range of qualifications they have achieved. Pupils are assigned	

	<p>Highest 20%</p>	<p>nationally into groups based on their total tariff points. This filter allows you to look in more detail at the result for the lowest 20% and highest 20% of attaining pupils.</p> <p>Since the pupil points groups are assigned nationally, it is important to note that an S4 pupil is more likely to be in the lowest 20% than the highest 20% and, similarly, an S6 pupil is more likely to be in the highest 20% than in the lowest 20%.</p> <p>The filter is available for all measures except the national dashboard measure on improving the attainment of all learners.</p>	
SIMD	<ul style="list-style-type: none"> • Any • Most deprived 30% • Middle 40% by deprivation • Least deprived 30% 	<p>This filter is based on the Pupil Census for the year being considered and the Scottish Index of Multiple Deprivation 2016 (SIMD) rank of the pupil's home area.</p> <p>The SIMD 2016 identifies small area concentrations of multiple deprivation across Scotland. It is based on data zones (a small area geography) and provides an assessment of multiple deprivation based on income, employment, health, education, housing, access to services and levels of crime in the area. It provides a relative measure of deprivation which means that the data zones can be ranked from most to least deprived and cut offs can be applied to identify different levels of deprivation. Insight currently uses SIMD 2016 however development work is underway with the aim of transitioning to the updated 2016 index.</p> <p>These filter choices allow you to restrict your results to the most deprived 30% of data zones, the middle 40% of data zones and the least deprived 30% of data zones respectively.</p> <p>The filter is available for all measures except the national dashboard measure on improving attainment versus deprivation.</p>	
Stage	<ul style="list-style-type: none"> • S4 • S5 • S6 • S4/S5 (in S4 or S5) • S5/S6 (in S5 or S6) • S4/S5/S6 (in S4 or S5 or S6) 	<p>This filter is calculated using a stage estimation algorithm based on Pupil Census data.</p>	

Davies D (Deborah)

To: Office List
Subject: SCIS Restructuring

Dear colleague

Due to restructuring at SCIS, the Policy & Liaison post has been discontinued, and Ruth Mendel has moved on as of this month.

Please use the above e-mail address for future communications and we will let you know asap who the new contact point will be.

Best wishes

John Edward

Director