

Public Appointments letter from Shirley-Anne Somerville to Jayne-Anne Gadhia, sent 16/11/16

Minister for Further Education, Higher Education and Science



**Scottish Government
Riaghaltas na h-Alba
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Personal

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16 November 2016

Invitation to Chair the Review of Student Support

Further to our conversation, I am delighted that you have agreed to Chair the Review of Student Support. I am now writing to invite you to formally accept this position from the 25th October 2016 to 31st August 2017, subject to the terms and conditions set out in **Annex A** to this letter.

I should be grateful if you would confirm in writing your willingness to accept this appointment on the above terms by signing and dating the box provided on the final page of **Annex A**. Please return the completed original to Aileen McKechnie, Director of Advanced Learning and Science, Scottish Government, 5 Atlantic Quay, 150 Broomielaw, Glasgow, G2 8LU.

Other members of the Review, selected by the Scottish Government, will be announced shortly. I envisage a Review Group of up to 12 members (not including the Chair).

Secretariat support for the Chair and Review will be provided by Scottish Government officials.

If you have any questions about this letter or the Annexes that you would like to discuss before acceptance, please contact Aileen McKechnie on 0300 244 1264 or at DirectorofAdvancedLearningandScience@gov.scot.

I am confident that you will find this appointment both interesting and rewarding. Providing a student support system that is fair and effective for all students in further and higher education is a key commitment of this government.

I look forward to working with you on this important issue over the coming year.

Yours sincerely,



SHIRLEY-ANNE SOMERVILLE

Annex A

1 Status

1.1 You are appointed to Chair the Review of Student Support. In these terms and conditions, except where stated, “you” and related expressions refer to the holder of that office.

2 Duties and Responsibilities

2.1 The main purpose of the Review is set out in the Scottish Government’s ‘Programme for Government’ published on 6th September 2016:

(<http://www.gov.scot/About/Performance/programme-for-government>) - namely to assess the effectiveness of the current system of student support for all students engaged in further (FE) and higher education (HE) and make recommendations for beneficial change. The draft remit for the Review, approved by Ministers, is attached at

Annex B.

2.2 The role of the Chair is to provide active and effective leadership, direction, support and guidance to ensure that the Review delivers on this remit and within the required timescales.

2.3 Key requirements for the Chair include:

- prepare for, and attend, meetings of the Review;
- provide effective leadership, including chairing meetings, setting out the scope for the Review and providing appropriate parameters for discussion;
- lead on the development of an evidence base, including where appropriate, the commissioning and publication of independent research;
- attending other stakeholder meetings and events relevant to the work of the Review (the secretariat will be able to advise which meetings might lend themselves to participation in your capacity as Chair);
- Publish, by Autumn 2017, a report to Ministers outlining ways to reform student support to ensure the entire system is firmly focussed on meeting the needs of students in FE and HE, particularly the most vulnerable.

3 Accountability

3.1 You are appointed by, and are accountable with other members conducting the Review to Scottish Ministers for the actions and outputs.

4 Period of Appointment

4.1 This appointment will take effect from 25th October 2016 and will end on 31st August 2017 (unless terminated before that date or extended with your agreement).

5 Time Commitment

5.1 It is anticipated that Chairing the Review and performing the functions and responsibilities set out in condition 2 above will require a commitment of two to three (each of 7.5 hours) days a month.

6 Expenses

6.1 Expenses reasonably incurred in the exercise of your functions as Chair in relation to travel and subsistence away from home in order to attend meetings of the Review, stakeholder meetings (agreed with the Secretariat) and meetings with Scottish Government officials will be reimbursed upon evidence of expenditure.

6.2 Reimbursement will be at the Scottish Government's normal travel and subsistence rates. A copy of the current rates and conditions will be provided separately.

7 Liability

7.1 This appointment shall not be construed as in any way constituting a contract of service or for services between you and the Scottish Ministers or as between you and the Crown.

7.2 If legal proceedings are brought against you by a third party, the Scottish Ministers will meet any civil liability incurred in performing your functions, provided that you acted honestly and in good faith, and did not act recklessly or negligently.

8 Confidentiality

8.1 As Chair of the Review of Student Support – and after termination of that appointment (howsoever arriving) – you will owe a duty of confidentiality to the Scottish Ministers in relation to any information of a confidential nature to which you have access in the course of your appointment. The sensitive nature of the issues and documents with which you may be dealing makes it extremely important that such confidentiality is respected. You will be required to exercise care in the use of information which you acquire in the course of your duties and to protect from unauthorised disclosure any documents or other information provided to you in confidence.

9 Conflicts of Interest

9.1 You must declare any personal or business interest which may be perceived to influence your judgement in performing your functions. These interests should be included in a register of interests maintained by the Review Secretariat and you must ensure that your entries are kept up-to-date.

9.2 You will not participate in any activities which conflict with the interests of the Review and, in particular, you must not misuse your office, or any information acquired in the course of your office, to further your private interests or those of others.

10 Political Activity

10.1 You are expected not to occupy paid party political posts or hold particularly sensitive or high roles in a political party. Subject to the foregoing, you are free to engage in political activities provided that you are conscious of your general public responsibilities and exercise a proper discretion.

10.2 You are expected to inform the Scottish Ministers of any intention to accept a prominent position in any political party and to understand that your appointment may be terminated if the Scottish Ministers feel that the positions are incompatible.

I accept appointment to the office of Chair of the Review of Student Support on the terms set out in Annex A.

Signature: Date:

Full name (in block capitals):

Annex B

DRAFT REMIT FOR THE REVIEW OF STUDENT SUPPORT

Background and Remit

1. On 6 September, in setting out her Programme for Government, the First Minister announced:

“Starting in October this year and reporting by autumn 2017, we will undertake a thorough review of student support to ensure that the entire system is firmly focused on meeting the needs of students in further and higher education, particularly the most vulnerable. We want all students at university or college to benefit from a fair and effective package of appropriate support”.

2. The Minister for Further Education, Higher Education and Science has made clear that the focus of this wide ranging review is the award of living cost support to students, the Scottish Government (SG) policy on free tuition is not within scope. Ministers want the review to be bold and inquisitive, but also aware of the evident constraint on the public finances. It will therefore be important for the Chair – and working group members – to make connections to relevant and complementary SG policy under development, e.g. connecting to early years childcare reform could influence the need for additional support for students with childcare responsibilities.

3. The overall remit of the review is to assess the appropriateness and effectiveness of the various Scottish Government means of supporting students engaged in FE and HE in Scotland, and present recommendations for improvement. This will take place within the broader context of reform to the ‘Learner Journey’ (i.e. route by which students currently progress through different levels of education).

Role of Chair

4. The role played by the chair will be critical to delivering a successful review process and final report that contains credible recommendations for improving the current system and enhancing students journey through education. It will be necessary for the chair to provide strategic leadership and brigade a diverse range of views and interests to deliver progress within Ministers prescribed timescales. As well as allowing space for creative

discussion, the Chair will be required to direct, challenge and scrutinise ideas that will ultimately inform independent, evidence based recommendations to Ministers.

5. Specifically the Chair will be expected to:

- Set out the scope of the review and provide parameters for discussion;
- Lead on the development of an evidence base, including where appropriate, the commissioning and publication of independent research;
- Ensure progress is made towards agreed milestones;
- Publish, by Autumn 2017, a report to Ministers outlining ways to reform student support to ensure the entire system is firmly focussed on meeting the needs of students in FE and HE, particularly the most vulnerable.

Briefing to Minister ahead of first meeting with Jayne-Anne – sent 24/10/16 (some sections redacted under Sections 30(b)(i) and 30(b)(ii) – free and frank exchange of views for the purposes of deliberation, and section 38(1)(b) – personal data)

PS/Minister for Further Education, Higher Education and Science

Ahead of Ms Somerville's meeting with Jayne-Anne Gadhia tomorrow, please find information on the review, including a draft governance structure and project initiation document.

I have also attached a policy paper which summarises the main challenges with existing further and higher education student support systems. This paper includes a summary of NUS Scotland position.

Finally, I have attached a draft engagement plan which sets out our approach to engagement between now and final reporting.

I hope that is helpful but happy to provide any further material that Ms Somerville would find useful.

REVIEW OF STUDENT SUPPORT IN SCOTLAND – FINAL DRAFT REMIT

Aim

The aim of this independent review is to assess the effectiveness of the system of support for all students engaged in further (FE) and higher education (HE) in Scotland, and make recommendations for beneficial change. The review will be carried out in the wider context of Scottish Government ambitions to improve the efficiency and effectiveness of post-16 learner journey and widen access to higher education. Specifically, the review will:

- Assess the appropriateness and effectiveness of the various Scottish Government means of supporting students engaged in FE and HE in Scotland - delivered through SAAS, SFC, universities and colleges;
- Present recommendations to improve Scottish Government support for all FE and HE students in Scotland.

Output

The review group is invited to provide a report offering recommendations for change affecting support for students across the tertiary sector. It will be left to the chair and other group members to assess the benefit that can be accrued for learners from making recommendation specific to the FE sector, HE sector or offering recommendations for change that will apply to all students across the tertiary sector.

The audience for the final report will be Scottish Ministers, with relevant stakeholders invited to consider implementation.

Terms of Reference

- The Review Group will be independently chaired, and will be supported by a stakeholder advisory group whose role is to identify options that have the potential to improve the student support system in Scotland;
- The Chair will advise Ministers on the final form of the remit, agreed governance structures and associated work timetable prior to commencement of the review;
- The group will be asked to agree to work to the final remit;
- The group may form sub-groups to examine the particular requirements of both the system of student support as it relates to the FE and HE sectors;
- In its work, the review group should acknowledge the constraints on public funding, make connections with relevant policy development in other areas (e.g. the expansion of child-care provision) and the administration of benefits by both the Scottish and UK governments. There could be challenges in aligning the different timescales for implementation in other policy areas with the timescale in place for this review.

Role of the Chair

The role played by the chair will be critical to delivering a successful review process and final report that contains credible recommendations for improving the current system and enhancing students journey through education. It will be necessary for the chair to provide strategic leadership and brigade a diverse range of views and interests to deliver progress within Ministers prescribed timescales. As well as allowing space for creative discussion, the Chair will be required to direct, challenge and scrutinise ideas that will ultimately inform independent, evidence based recommendations to Ministers.

Specifically the Chair will be expected to:

- Set out the scope of the review and provide parameters for discussion.
- Lead on the development of an evidence base, including where appropriate, the commissioning and publication of independent research.
- Ensure progress is made towards agreed milestones.
- Publish, by Autumn 2017, a report to Ministers outlining ways to reform student support to ensure the entire system is firmly focussed on meeting the needs of students in FE and HE, particularly the most vulnerable.

Review Group Membership

Membership will include the Scottish Government, the Student Awards Agency Scotland, Universities Scotland (SAAS), Colleges Scotland, the Scottish Funding Council (SFC), NUS Scotland and representatives from outside of the tertiary education sector, who can offer a different perspective, including those not yet engaged in learning in order to understand barriers. The group will continually review its membership to ensure that it has wide expertise covering different perspectives and is inclusive. The group may co-opt members with specific expertise to attend meetings on an ad hoc basis and will produce an engagement plan which draws in the views of all learners and potential learners.

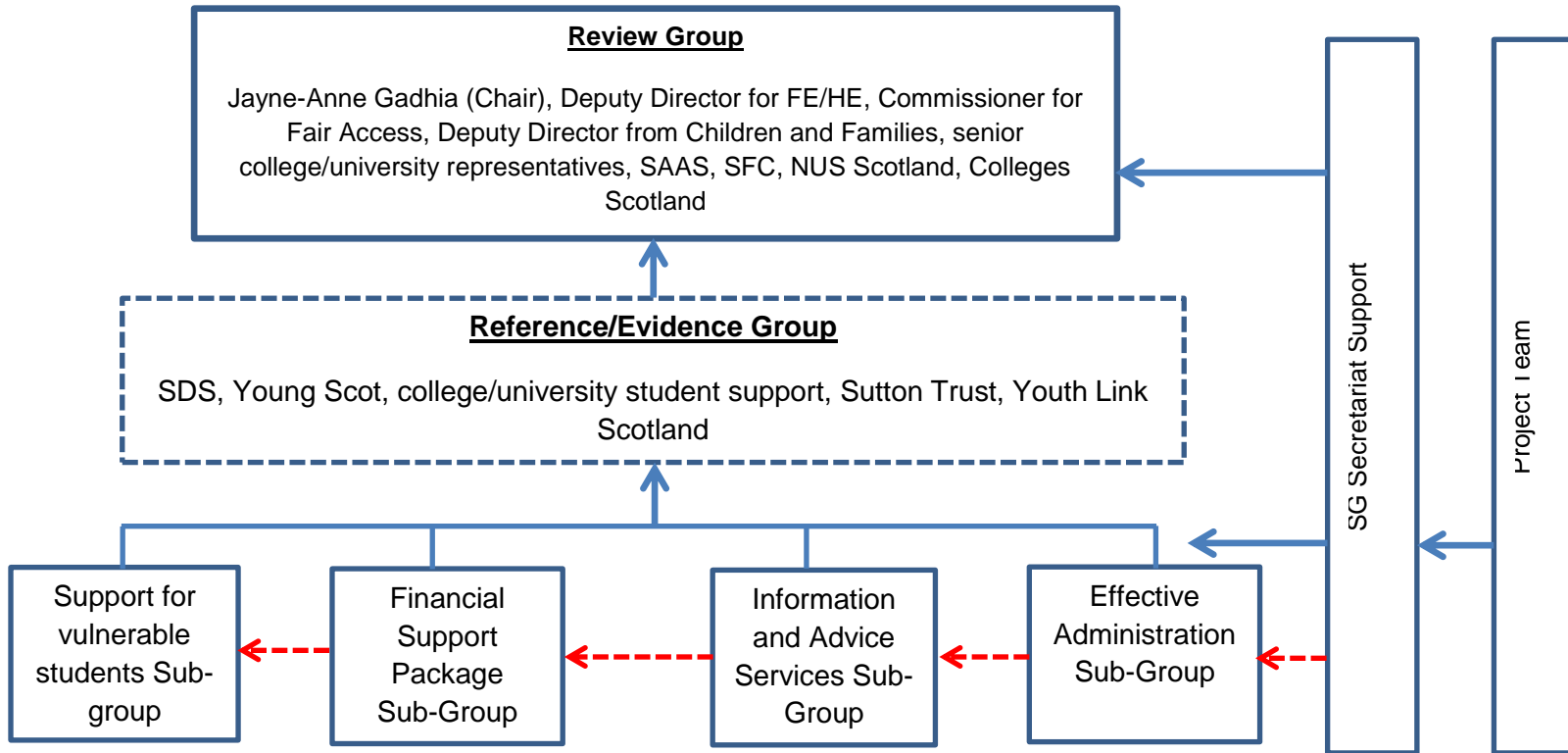
A draft governance structure is attached at [annex A](#).

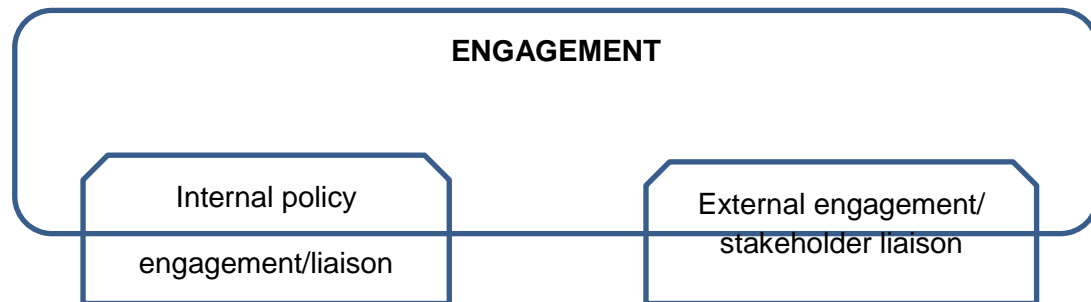
Secretariat

The secretariat function will be provided by Scottish Government officials. Minutes of meetings will be published on the Scottish Government website.

[redacted]

DRAFT GOVERNANCE STRUCTURE





OVERVIEW OF MEMBERSHIP INTERESTS/GROUPS REPRESENTED

| REVIEW GROUP | | |
|---|--|--|
| Member/Organisation | Role in this review | Interests |
| Jayne-Anne Gadhia | Chairperson leading review | All interests concerning FE and HE student support |
| Director of Advanced Learning and Science (ALS) | Senior Director on review group, maintain strategic oversight of review outputs and recommendations being presented to Ministers | Support package FE and HE, Ministers, cross-cutting SG policy, colleges and universities |
| Commissioner for Fair Access | To ensure linkage with the work of the Commission on Widening Access | Widening and fair access, disadvantaged students, support package HE and FE |
| Deputy Director from Children and Families | Provide senior official representation to this work, recognising the cross-cutting interests across SG portfolios | Cross-cutting SG policy |
| Senior College representative | Represent interests of colleges and further education sector | Colleges, students, support package HE and FE |
| Senior University representative | Represent interests of university and higher education sector | Universities, students, support package HE and FE |
| Students Awards Agency Scotland (SAAS) | Provide strategic oversight of current HE student support system administered by SAAS | Student support package HE, students, universities |
| Scottish Funding Council | Provide strategic oversight of | Student support |

| | | |
|---|--|---|
| (SFC) | current FE student support system administered by SFC and colleges | package FE, students, colleges |
| National Union of Students (NUS) Scotland | Represent student interests and support the review by providing insight and views of students in relation to the current and future support packages | Students, colleges, universities, support package HE and FE, widening access, disadvantaged students, |
| Colleges Scotland | Represent interests of colleges, act as a collective voice across the sector in Scotland | Colleges, students, support package HE and FE |

| MAIN WORKING GROUP/EVIDENCE GROUP | | |
|---|---|---|
| Interests | Role in this review | Interests |
| Skills Development Scotland (SDS) | Represent the interests of the employment sector and opportunities such as modern apprenticeships, and other routes into the workplace | Students, prospective students, employment opportunities, public & private sector |
| Young Scot | Support the review by drawing on their expertise of working with young people aged 11 – 26 by providing advice, services, and information to help inform future educational opportunities and careers. Also represent the interests of young scots across a wide age range. | Students, prospective students, , student support package HE and FE |
| College student support representative | Advise on student support systems and practice across the FE sector | Colleges, SFC, students, , student support package FE |
| University student support representative | Advise on student support systems and practice across the HE sector | Universities, SAAS, students, student support package HE |
| Sutton Trust | Support the review by providing evidence informed by research to address educational inequalities | Disadvantaged students, widening access, student support package HE and FE |
| Youth Link Scotland | Contribute to the review by utilising their expertise in working across the youth work sector and representing a wide range of interests. | Students, youth work sector (voluntary & statutory), 3 rd sector, disadvantaged students |

[redacted]

FURTHER AND HIGHER EDUCATION STUDENT SUPPORT – ISSUES PAPER

INTRODUCTION

The current Further (FE) and Higher Education (HE) student support systems have been designed to meet the specific needs of very different student groups. The HE system, administered by the Students Awards Agency for Scotland (SAAS) directly to students, is very different from the face-to-face, FE student support services delivered by colleges (though, in Scotland, a significant proportion of HE students study at colleges - typically around 17%; there is no difference in the financial support available to students studying HE at college and those studying at university).

RECENT HISTORY

HE student support was reviewed in 2011 in an attempt to simplify the system, improve efficiency and deliver a manifesto commitment to a minimum income guarantee of £7,000. When developing the new package, the Scottish Government worked with the National Unions of Students (NUS) Scotland and others to put 'more money in students pockets'.

[redacted]

THE CURRENT SCOTTISH STUDENT SUPPORT SYSTEM

| Type of funding or support | Full-time | | Part-time | |
|--|--|--|--|--|
| | FE (SCQF Levels 1-6) | HE (SCQF Levels 7-12) | FE (SCQF Levels 1-6) | HE (SCQF Levels 7-12) |
| Total budget and number of students | <ul style="list-style-type: none"> 2016-17 budget £106m Latest figures show 44k students receive FE bursaries per annum. | <ul style="list-style-type: none"> In academic year 2014/15 £781.3m (fees, bursaries and loans approved) was paid to 139,370 full time students¹ And was disbursed as follows: <ul style="list-style-type: none"> Tuition fees paid to HEIs for students - £249m for 133,460 students (includes tuition fee loans) Bursaries & grants paid to students - £63.6m for 52,315 students (includes Lone Parent Grant, Dependents Grant and Disabled Student Allowance) Loans authorised - £468.8m for 88,985 students | SAME AS F/T FE | |
| Tuition Fee Support | £1,008 (paid directly to institution by SFC on behalf of student) | £1,820 (paid directly to institution by SAAS on behalf of student) | £1,008 (paid by SFC for eligible students – 2 or more p/t courses at max. rate) | £1,285 (paid by SFC for eligible students) |
| EMA (16-19 year olds) | <p>ENTITLEMENT Non-repayable Processed by local authorities, colleges via the SFC</p> <ul style="list-style-type: none"> Eligible students receive £30pw subject to attendance and agreement of learning plan Eligible household | NO | SAME AS F/T FE | NO |

¹ https://www.saas.gov.uk/forms/statistics_1314.pdf

| Type of funding or support | Full-time | | Part-time | |
|----------------------------|---|--|----------------------|-----------------------|
| | FE (SCQF Levels 1-6) | HE (SCQF Levels 7-12) | FE (SCQF Levels 1-6) | HE (SCQF Levels 7-12) |
| | <p>income thresholds >£24,421 with 1 dependent child, >£26,884 for 2 or more dependent children</p> <ul style="list-style-type: none"> Average annual award: <ul style="list-style-type: none"> school pupil - £825 college student - £742 | | | |
| Living costs | | | | |
| Maintenance Bursary | <p>DISCRETIONARY Non-repayable Processed by colleges</p> <ul style="list-style-type: none"> Max annual award of £4,125 Max award of £95.94 pw if 18-25 and living away from home, or any age if supporting yourself with family income >£20,463. If 18-25, living with parents and family income >£24,275 max = £3,215 (£75.91 pw) | <p>ENTITLEMENT Non-repayable Processed by SAAS</p> <ul style="list-style-type: none"> Means-tested bursary. Maximum of £1,875 (young students with a household income of less than £17,000 increasing to £19,000 in AY16/17. (Equivalent to £36 a week) Maximum of £875 (independent students with a household income less than £17,000 increasing to £19,000 for AY 16-17. | NO | NO |
| Maintenance loans | NO | <p>All students up to £4,750 pa regardless of circumstances.</p> <p>Maximum of £5,750 (young students with a household income less than £17,000 increasing to £19,000.</p> <p>Maximum of £6,750 (independent students with a household income less than £17,000 as above.</p> | NO | NO |
| Travel costs | <p>Students living more than 2 miles from college can apply for assistance. Processed by college</p> | NO (Incorporated in total support package) | SAME AS F/T FE | NO |
| Study costs | No threshold – must be 'best value' | NO (Incorporated into total support) | SAME AS F/T FE | NO |

| Type of funding or support | Full-time | | Part-time | |
|---|--|---|----------------------|---|
| | FE (SCQF Levels 1-6) | HE (SCQF Levels 7-12) | FE (SCQF Levels 1-6) | HE (SCQF Levels 7-12) |
| | Processed by college | package) | | |
| Help for dependants | | | | |
| Adult Dependant's Grant | Up to £2,351 pa (£54.69 pw) Processed by college | Up to £2,640 pa Processed by SAAS | NO | NO |
| Lone Parent's Grant | NO | Up to £1,305 pa Processed by SAAS | NO | NO |
| Lone Parent's Childcare Grant | Up to £1,215 pa Processed by college | Up to £1,215 pa Processed by institution | NO | NO |
| Childcare Funds | Discretionary. Allocation based on £3k pa average per student. Processed by college | Yes Discretionary allocation processed by institution | SAME AS F/T FE | NO |
| Other support | | | | |
| Vacation grant for Care-leavers | | Up to £105 per week to cover accommodation costs during the summer vacation | | |
| Disabled Student's Allowance | NO | Three possible awards: Basic up to £1,725 pa (study aids), Special Equipment up to £5,160, Non-Medical Personal Help up to £20,520. | NO | Yes for students studying at least 50% of the full-time equivalent course. The basic and non medical personal help rates are paid pro-rata based |
| Additional Support Needs for Learning Allowance | Can assist with additional expenditure incurred by ASN students i.e. taxis. Processed by college | NO | SAME AS F/T FE | NO |
| Discretionary Funds | Part of £106m student support pot. Processed by college | £10m pot across all institutions. Processed by institution | SAME AS F/T FE | SAME AS F/T HE |

Notes

1. Where FE awards are a weekly rate, maximum annual awards have been calculated using the maximum number of weeks possible (43).
2. EMA income thresholds as of 1 January 2016.
3. Eligible FE part-time students can receive EMA payments - introduced 1 January 2016
4. Income threshold to access maximum support for HE students will rise to <19K from 2016-17 (currently <17K)

[redacted]

STUDENT SUPPORT REVIEW: COMMUNICATIONS AND ENGAGEMENT PLAN

Aim

To improve the package of support available to all Further (FE) and Higher Education (HE) students undertaking their studies at college and university in Scotland, particularly the most vulnerable.

Objectives

- To announce appointment of independent Chair and review launch.
- To clarify scope of review and communicate key milestones.
- To communicate opportunity to stakeholders to contribute views.
- To build momentum for support of reform proposals across FE+ HE sector.

[redacted]

PHASE 1: Now – End December 2016

- Launch review via press release following publication of SAAS annual stats release to maximise publicity. Photo of Minister and Chair to feature same day.
- Establish visibility, awareness of Chair appointment and review objectives via a bespoke visit to a college or university. Photo opportunity for Minister and Chair with group of students.
- Clarify review scope.
- [redacted]
- Announce a Call for Evidence.

PHASE 2: January – June 2017

- Continue to publicise Call for Evidence ahead of closing date.
- Maintain interest in and exposure of review.
- Share emerging issues and engagement activity.
- Build momentum and stakeholder support for final recommendations and reporting.

PHASE 3: Period up to Final Report (Autumn 2017)

- Maximise interest and trail publication of final report.
- Seek to test support for final recommendations and reporting (e.g. from NUS and other key stakeholders).
- Announce publication of report.

Engagement Techniques

Launch

Following publication of a SAAS statistical release on 25/10 covering HE student support, an SG press release will launch the review and announce the Chair appointment. This will include a quote from the Minister for Further Education, Higher Education and Science and Chair. A photo opportunity including the Minister and Chair has been arranged for that day.

Media Event

A bespoke media event at a college or university will be planned for November to include photo opportunity for Minister for Further Education, Higher Education and Science, Chair and group of students to continue media coverage.

Twitter

Initially, we would not seek to establish a standalone Twitter account for the Review but would seek to establish a review '#hashtag'. We would also seek to make use of existing and well-established Ministers, SG, NUS and other relevant stakeholders accounts.

Use of Twitter could be planned to: mark and welcome the launch, announce the Chair and Review Group membership, communicate meetings and engagements, publicise the Call for Evidence and share emerging themes. It will be important to maintain a twitter presence for the duration of the process and to preserve interest and build towards a final report. Members of the Review Group could also be asked to make use of their own Twitter accounts to re-tweet SG comments as well as make their own.

Call for Evidence

Whilst a Call for Evidence would be intended to gather information to influence and support the workings of the group, it could also be used to further publicise the review work. This can also promote the review's willingness to hear from a range of groups.

Review Blog

Depending on the views of the Chair, there is an option available for a regular blog to cover the review's progress. A well-known blogger within the HE sector is Lucy Hunter Blackburn and it could be possible to broadly follow this format - <https://adventuresinevidence.com/>.

Visits and Events

Over the course of the review process, it will be important to arrange a number of visits and events (of varying scale) to hear the views and perspectives of students, staff and relevant agencies from a range of different institutions and backgrounds. Events are often seen as a key means by which to receive evidence on areas that are of greatest concern or challenge.

Focus Groups

NUS have made clear they see this type of engagement as the most effective way to engage students and gain qualitative evidence on the challenges being faced by students day to day. It is likely these discussions would take place on campus. This

may also be a useful way to involve those not yet engaged in education or students who have completed their studies and are currently repaying their student support.

Briefing to Minister ahead of first meeting of Review Board 5/12/16 – sent 30/11/16 (some sections redacted under Sections 30(b)(i) and 30(b)(ii) – free and frank exchange of views for the purposes of deliberation and section 38(1)(b) – personal data)

PS/Minister for Further Education, Higher Education and Science

Please find attached briefing for the first meeting of the Student Support Review Group to be held at Forth Valley College on Monday 5th December.

I am also attaching the papers for the meeting which have today been shared with the Chair for her approval. The Chair intends to issue these tomorrow.



Review of Student
Support - Re...

REVIEW OF STUDENT SUPPORT – FIRST MEETING OF REVIEW GROUP

| | |
|---|---|
| <i>Date and Time of Engagement</i> | <p>First meeting of the Student Support Review Group</p> <p>Monday 5th December</p> <p>08:45 - 10:15</p> |
| <i>Where</i> | <p>Forth Valley College, Alloa campus</p> <p>Devon Road</p> <p>Alloa</p> <p>Falkirk</p> <p>FK10 1PX</p> |
| <i>Who</i> | <p>Jayne-Anne Gadhia, Independent Chair of the Review will convene the first meeting of the group. Biographies of attendees is available at Annex E.</p> |
| <i>Key Purpose</i> | <p>Opportunity to have a private meeting with the Chair to outline ambitions and expectations, welcome and thank Working Group members and set the scene for the review.</p> |
| <i>Media Handling</i> | <p>SG Communications will be in attendance to manage filming of a short video and photo opportunities. A media calling notice will be issued.</p> <p>Comms. Lead – [redacted]</p> |
| <i>Official Support</i> | <p>[redacted]</p> |
| <i>Greeting Party and specific meeting point</i> | <p>[redacted] will meet you at the front door and introduce you to Jayne-Anne Gadhia ahead of your private meeting at 08:45. A private room has been made available. [redacted] will lead you both to that.</p> |

| | |
|--|---|
| <i>Car parking arrangements</i> | A car parking space will be made available. |
|--|---|

Briefing Contents

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Annex J

Forth Valley College Regional Profile

Event Programme

| | |
|----------------------|--|
| 08:45 – 09:15 | <u>Private Meeting</u> : Jayne-Anne Gadhia, Chair of Student Support Review and Shirley-Anne Somerville, Minister for Further Education, Higher Education and Science. |
| 09:15 – 09:45 | Media activity / photo opportunity / meet students |
| 09:45 – 10:00 | Short college tour / meet students |
| 10:00 – 10:15 | First Meeting of the Review Group: Agenda item 1: welcome Working Group members and set the scene for the Review. |

Agenda for First Meeting

- 1 Welcome** Shirley-Anne Somerville to welcome the Working Group and set the scene for the Review.

Introduce Jayne-Anne Gadhia (JAG) as Chair and hand over to her.

MINISTER DEPARTS
- 2 Introductions** JAG to introduce herself and ask each Working Group member to introduce themselves and explain what they do.
- 3 Remit and Scope** JAG to explain how the Working Group will operate, its purpose and how each member can contribute.

Each member to explain their experience, the issues as they see them and their ambitions for student support through the Review (5 minutes each).

4 Proposed Review Themes

Discuss the proposed themes set out by Scottish Government:

- Support for Vulnerable Students
- Effective administration of financial support package
- Information and advice services

Are there additional themes to be considered?

5 Obtaining Evidence

Discussion of options for gathering evidence and data. Should there be a consultation or survey from relevant stakeholders? Discuss method and timing.

6 Governance

Plan for how the Board will operate to deliver a published report by autumn 2017.

Discussion of future meetings – timing and structure. Proposed meetings every 2 months with conference calls between.

Summary – Arrangements for the Event

Private Meeting

The private meeting will take place between 08:45 and 09:15. A private room in the College (A240) will be made available. Dr Ken Thomson, Principal of Forth Valley College will provide direction.

College Tour / Meeting Students

The College will ensure that students are available to meet both the Minister and Chair to talk about their studies and experience of student support. The tour will include;

- a simulated nursery which has been identified as suitable for the photo opportunity and media activity **(this will take place first at 09:15)**

The tour (from around 09:45 to 10:00) will then involve viewing:

- a fully functioning hair and beauty salon;
- a home economics class with fully functioning kitchen and;
- a facilities management workshop designed for apprentices.

Classes will be taking place in all four locations with students prepared for discussion.

Media Coverage

Communications colleagues will be in attendance to support the photo opportunity with the Chair. The simulated nursery at the College has been identified as a suitable backdrop for photos and interviews. This activity will take place between 09:15 – 09:45, following your private meeting with the Chair.

SG Communications will be in attendance for media activity. A media calling notice will be issued on Thursday 1st December. SG Comms. will manage both the video filming and photo opportunities with the Chair and students.

An SG press release is planned for Monday 5th December to announce membership of the Review Group. This will be provided separately by SG Comms. for your clearance.

Lines to take:

- ***Jayne-Anne Gadhia, CEO of Virgin Money, brings strong financial experience and a fresh perspective to the work of the review***
- ***The Review will explore the effectiveness of the system and assess whether college and university students receive a fair and effective package of support***
- ***The Review will look at the balance of support available, including how to ensure the most effective support for our poorest and most vulnerable students***
- ***Reviewing student support to make sure the system is fair and effective is a commitment under the Programme for Government***
- ***As a member of the International Council of Education Advisers, Jayne-Anne is already involved in our work to reform Scottish education***
- ***We look forward to the recommendations of the Review Group, which will report its findings to the Scottish Government by Autumn next year***

If pressed on budget:

- ***Ministers want the review to be bold and inquisitive, but clearly the Review Group will also need to be aware of the evident constraint on the public finances.***

Background Information - Simulated Nursery

The Nursery provides a vibrant learning environment where students are empowered to be creative and independent in their learning. Within this space students are able to actively explore opportunities to integrate learning opportunities which support progression and employability. Early Learning and Childcare (ELC) provision at Forth Valley College has a culture of partnership and engagement with stakeholders with students across SCQF levels 5-7 undertaking workplace practice experience. The introduction of the new HNC framework is in response to both local and national

drivers and the need to ensure the delivery of sector standard qualifications. The simulated space is effective in supporting skill development in ELC with students engaging within the planning, organisation and management of resources within this context in preparation for work placement.

Speaking Slot at Review Group Meeting

The first meeting presents an opportunity to welcome Working Group members and thank them for taking part in the review and outline your ambitions for what you are looking for it to achieve. A suggested speaking note is provided at **Annex D**.

Role of the Chair and Governance Arrangements

Role of Chair

The role played by the chair will be critical to delivering a successful review process and final report that contains credible recommendations for improving the current system and enhancing students journey through education. It will be necessary for the Chair to provide strategic leadership and brigade a diverse range of views and interests to deliver progress within Ministers prescribed timescales. As well as allowing space for creative discussion, the Chair will be required to direct, challenge and scrutinise ideas that will ultimately inform independent, evidence based recommendations to Ministers.

Specifically the Chair will be expected to:

- Set out the scope of the review and provide parameters for discussion;
- Lead on the development of an evidence base, including where appropriate, the commissioning and publication of independent research;
- Ensure progress is made towards agreed milestones;
- Publish, by Autumn 2017, a report to Ministers outlining ways to reform student support to ensure the entire system is firmly focussed on meeting the needs of students in FE and HE, particularly the most vulnerable.

Review Governance Arrangements

The chair would like regular monthly engagement with Review Group members. Meetings proposed to take place every 2 months with conference calls in between. Sub-group activity will take place separately with activity expected to be grouped around the following 3 themes:

- *Support for vulnerable students*
- *Effective administration of financial support package*
- *Information and advice services*

This remains subject to change and will be discussed at the first meeting. Dates, timing and structure of future meetings will be agreed at the first meeting. Future meetings are likely to take place at Virgin Money offices in Edinburgh to accommodate Chair and working group members' diaries. However, other central locations will also be considered.

Further information on governance arrangements is set out in undernoted annexes.

- Review Group Remit at **Annex F**
- Sub-Group Remit at **Annex G**
- Governance structure available at **Annex H**.

Speaking Note

Intro

- Thanks for coming along today and for agreeing to take part in the Scottish Government's Review of Student Support. Thanks also to Forth Valley College and Principal Ken Thomson for hosting us at this fabulous new campus.
- I'm very passionate about this Review and I'm delighted that Jayne-Anne has agreed to take on the role of independent Chair. As well as a fresh perspective, she brings with her a wealth of experience from her role in Virgin Money and in other government commissions. Jayne-Anne has already shared with you her interest in young people, from all backgrounds, having the tools they need to succeed to improve their outcomes and the outcomes for our economy overall. This is an ambition I share, and the right student support package is absolutely central to this.
- I want the system of support to be better. But I don't just want a slightly improved version of the existing package, I would like to see a more comprehensive rethink of how we deliver support in Scotland. I would like you to be bold and

inquisitive in your approach and to think about improvement over the longer term.

- This is a really exciting area of work that matters for anyone trying to navigate their way through (or back into) the education system in Scotland. I want this experience to be improved for all students across further and higher education - whether they are straight out of school, returning to education, with dependents, with a disability, or experience of the care system, and regardless of their age.

Remit and Scope

- The aim of the review of student support is to assess the effectiveness of the system of support for all students engaged in further and higher education in Scotland, and make recommendations for beneficial change.
- I've already made clear that I would like *all* students to be considered as part of this review but I want to make clear we are focused on undergraduate support. The Scottish Government recently delivered a review of postgraduate support, and I expect to be in a position to make an announcement on that shortly.

- I know some of the existing challenges being faced are different for further and higher education but I want you to look at the system as one, rather than as distinct areas.
- Among some of the areas you are likely to have to consider are:
 - The most effective support for the poorest and most vulnerable students;
 - The balance of support available to those in further and higher education;
 - The current repayment threshold and period for student loan debt.
- But it is for you to decide the what themes should be considered and to undertake your work.

OPTIONAL

- ***I've made clear my wish for the review to be bold and inquisitive, but I'd also ask you to be aware of the evident constraint on public finances. That will have to be factored into the development of your ideas and final recommendations for improvement.***

- *I'd also reiterate this Government's commitment to maintaining free tuition – so this review is about the maintenance package of support.*
- *I'd also ask you to be mindful of, and link into, reform and improvements taking place across different areas of Government. For example, the expansion of early years childcare and welfare reform. There are some real opportunities here.*

Close

- Thank you all once again for your commitment to this important area of work. The review will be enriched by your broad ranging experience and perspective.
- I very much look forward to your recommendations.

[Approximately 5 minutes]

CHAIR - Jayne-Anne Gadhia, CEO of Virgin Money

Jayne-Anne is CEO of Virgin Money since 2007. She trained as an accountant with Ernst & Young in 1982, before moving to Norwich Union in 1987. During the stock-market collapse of that year she was made marketing director of Norwich Union's unit-trust business. Whilst there, she was involved in the deal that produced Virgin Money. She worked under Fred Goodwin at the Royal Bank of Scotland from 2001-2006, before returning to the Virgin Brand. In 2008 she was chosen by Richard Branson to lead the bid to take over Northern Rock, and secured the £747 million takeover in 2012. She was the first female Chief Executive of a publicly-listed UK bank. Last year the UK Government asked her to lead a review into the representation of women in senior managerial roles in financial services.



[redacted]

SAAS: Paul Lowe, Chief Executive and Accountable Officer

Following a short career in healthcare Paul joined the Civil Service in 1999. He was appointed SAAS Chief Executive in February 2016. Prior to this Paul has undertaken a range of leadership roles in areas including project and programme management, operations, interagency working and policy. Paul has worked for a number of government organisations including the Crown Office and Procurator Fiscal Service, Scottish Court Service, Scottish Government and the Department for Work and Pensions.

Paul is a graduate of Glasgow University and holds degrees in Dental Surgery and Experimental Pathology. He is a registered practitioner for Prince 2, Managing Successful Programmes, Benefits Management, Management of Risk and holds the Association of Project Management qualification.



SFC: Dr John Kemp, Interim Chief Executive

John is currently Interim Chief Executive of the Scottish Funding Council. His previous post was as Director of Access Skills and Outcome Agreements at the Council, responsible for outcome agreements for universities and colleges, leadership of its work on access, skills and quality as well as supporting mergers and collaborations. He has been with the Council in a variety of roles since 2000.

Before working for the Funding Council he worked in publishing and local government. He has also taught and served on governing bodies in both the college and university sectors.



NUS Scotland: Vonnie Sandlan, President

At 16 Vonnie left school and lived in a homeless hostel. At 19 Vonnie was an unemployed single parent and states that the ‘transformative power of education’ changed her life.

Vonnie studied at Langside College, University of the West of Scotland, and Glasgow Caledonian University. She is a strong voice on social media articulating women’s and learners’ rights and an expert user of social media to access senior stakeholders and MSPs.

Vonnie was elected President of NUS Scotland in March 2015. She previously held the position of NUS Scotland’s Women’s Officer, campaigning to promote, defend and extend the rights of students. She was asked to join the Gender Steering Group set up by the SFC, to support the SFC’s Gender Action Plan – a recommendation of the

Commission for Developing Scotland's Young Workforce. The plan aims to address gender disparities in Scotland's colleges and will be published in August.

Vonnie has also campaigned for care leavers and is a board member of Who Cares? Scotland which is the only national organisation providing independent advocacy, support and advice to looked after young people. She also advises Equate Scotland and Engender in a voluntary capacity.



NUS Scotland: Philip Whyte, Policy and Influencing Manager

Philip joined NUS Scotland in 2011, after two years as president at the University of Strathclyde Students' Association. He graduated from Strathclyde in 2009 with a degree in law and politics.

His role at NUS Scotland involves supervising and coordinating the Policy & Delivery team, who undertake NUS Scotland's campaigning, policy, research, influencing and press work. In particular, he is lead staff member within a portfolio of funding, student support, widening access and governance.



Colleges Scotland: Shona Struthers, Chief Executive

Shona took up the post in August 2014, having acted as Interim Chief Executive since June 2014. She joined Colleges Scotland in November 2013 as Director of Policy and Public Affairs. Prior to that she ran her own education consultancy, during which time she planned and advised on the SRUC merger, advised City of Glasgow College on the financial and legal aspects of its three-college merger and also acted as corporate services director to the Scottish Further Education Unit (SFEU).

Prior to establishing her consultancy, Shona was Finance and Communications Director for Zeneca/ Avecia Ltd and became a chartered management accountant during her seven years at Imperial Chemical Industries (ICI).

Shona was a Forth Valley College board member for six years and chair of its Finance Committee. She previously served on the boards of the SFEU (2005-2008) and Falkirk Women's Technology Centre (1995-2005).



Universities Scotland: Alastair Sim, Director

Alastair has been Director of Universities Scotland since July 2009, joining from the Civil Service. The Director has chief executive responsibility for the management of the organisation.

Since 2009 he has navigated the Scottish HE sector through two Scottish elections, two general elections, a referendum on Scottish independence, several spending reviews and a funding gap. As a senior civil servant, Alastair developed new Scottish legislation on protection of the natural environment and on constitutional reform and was most latterly Director of Policy and Strategy at the Scottish Courts before joining Universities Scotland.

He holds degrees from Oxford, Delaware and Glasgow universities. Alastair has had two thrillers published: *Rosslyn Blood* (2004) and *The Unbelievers* (2009).



Young Scot: Louise MacDonald OBE, Chief Executive

Louise is Chief Executive of the award-winning youth information and citizenship charity Young Scot which supports young people aged 11-26 to make informed decisions and choices. She is a board member of ACOSVO, IoD Scotland Committee and the Scottish Parliament: Scotland's Futures Forum. Louise is also Vice Chair of Scotland's 2020 Climate Leadership Group and was voted CIPR Scotland Communicator of the Year 2011. Louise was also recently named as one of the Saltire Society "Inspirational Women of Scotland" and made the Guardian list of Top 30 Social CEOs.



Castlebay Community School: Annag MacLean, Headteacher

Annag is the head teacher of Castlebay Community School in Barra. Key features of her approach include a strong commitment to vocational education within the school's senior phase and a partnerships with local employers in its delivery. 2014 SQA Pride o' Worth Awards went to Annag and two of her colleagues.



Scottish Youth Parliament: Erin McAuley, MSYP

Erin is Deputy Convenor of the Lifelong Learning Committee of the Scottish Youth Parliament and member for Cunninghame South. She is a history, politics and professional education student teacher at Stirling University. Erin is a believer in grassroots politics and is a young trade unionist, with her passions rooted in her own personal experiences, including homelessness, poverty, and living with family members who suffer from mental illness and addiction.



Child Poverty Action Group: Angela Toal, Welfare Rights Worker

Angela is a welfare rights worker with CPAG in Scotland, working on the benefits for students project, and is author of CPAG's Benefits for Students in Scotland Handbook. She was previously advice team manager at The Action Group in Edinburgh.



Money Advice Scotland: Yvonne MacDermid OBE, Chief Executive

Yvonne has been involved in credit and debt matters since 1987, before which she had a career in the police service from 1975-1987 and then Trading Standards for 10 years as a money adviser and project leader. She has been involved in Money Advice Scotland since its inception in 1989, and has been Chief Executive since 1997. Yvonne was awarded the OBE in 2002 for services to disadvantaged communities and more recently was recognised with the Martin Williams Award for her contribution to the credit industry.



IPPR Scotland: Russell Gunson, Director

Before joining IPPR in 2015, Russell worked across government, parliament, and the voluntary and private sectors. Most recently, prior to moving to IPPR Scotland, Russell was director of NUS Scotland. Russell was a commissioner on the independent Commission on Widening Access, and was a founding director of Safe Deposits Scotland, the only non-profit tenancy deposit protection scheme based in Scotland.



Review Group Remit

Aim

The aim of this working group is to undertake a comprehensive review of the current systems of Further (FE) and Higher Education (HE) student support in Scotland and identify options for improving support, particularly for the most vulnerable students.

The working group will:

- Assess the appropriateness and effectiveness of the current support arrangements provided by the Scottish Government to students engaged in FE and HE through the Student Awards Agency Scotland (SAAS), the Scottish Funding Council (SFC), colleges and universities.
- Identify what works well within current student support systems in Scotland and elsewhere that could potentially improve the support offered to students.
- Seek to identify and understand challenges within the current student support systems, while recognising the varying needs of different student cohorts.
- Identify options for improving student support to ensure a lasting and positive impact for all students across the tertiary (FE and HE) sector.

Output

The working group will produce a final report for the Minister for Further Education, Higher Education and Science by Autumn 2017. The final report will offer commentary on current challenges, and make recommendations on how improvements can be made to ensure that the support being delivered is efficient, effective and appropriate.

Context

The Scottish Government's 2016 Scottish Parliamentary Election Manifesto committed to conduct a review of the student support system to make student support 'fairer' and for 'funding to follow individual students rather than places of study'. The review will be carried out in the wider context of Scottish Government's ambitions to improve the efficiency and effectiveness of the post-16 learner journey and to widen access to higher education.

The First Minister committed to review student support as part of her Programme for Government publication on 6th September:

"Starting in October this year and reporting by autumn 2017, we will undertake a thorough review of student support to ensure that the entire system is firmly focused on meeting the needs of students in further and higher education, particularly the most vulnerable. We want all students at university or college to benefit from a fair and effective package of appropriate support".

Terms of Reference

Relationship with Scottish Ministers

- The Working Group is an independent advisory group whose role is to review the current student support system and identify ideas for improvement in the design and delivery of the student support package for all students across FE and HE.
- The group will be invited to agree the remit and timetable for its work.
- While the remit of the working group will encompass the FE and HE sectors within Scotland, the group may wish to form sub-groups to examine the specific and unique requirements of different student groups.
- The review work should be bold and inquisitive, but also aware of the evident constraint on the public finances.
- Where possible, the group is encouraged to make connections with relevant policy development underway elsewhere and administration of benefits by both the UK and Scottish Governments to avoid duplication of support.
- It is anticipated that the main working group will meet 6 times between December 2016 and Autumn 2017. It will be a matter for the chair and the working group to specify how often sub-groups meet (if appropriate).

Membership

- The group will be chaired by an independent chair (Jayne-Anne Gadhia) who will bring a fresh perspective to the area of student support;
- The group will continuously review its membership to ensure that it has a wide range of expertise and is inclusive;
- The group may co-opt members with specific subject matter expertise to attend meetings on an ad hoc basis if deemed appropriate;
- In the event of the Chair being unavailable to attend meetings, another member of the working group will assume the role of chair.

Secretariat

- The secretariat function will be provided by Scottish Government officials;
- Scottish Government Analytical Services will also provide analytical support, as appropriate (in partnership with SFC where necessary);
- Minutes of meetings and meeting papers will be published on the Scottish Government website;
- Where possible, meetings will be held in Scottish Government premises, college or university campuses or in members' premises.

[redacted]

Sub-group Remit

The following broad thematic sub-groups have been established to support the Student Support Review Group:

- Support for vulnerable students
- Effective administration of financial support package
- Information and advice services

Aim

The aim of each sub-group is to gather evidence to inform final reporting. It is possible that sub-groups will meet to discuss issues faced but activity is more likely to take the form of evidence-gathering including round table discussion, surveys, focus groups, interviews with individual students and case studies. Sub-group representatives are likely to be invited to attend core Review Group meetings where appropriate and based on interest, e.g. to deliver presentations at core group meetings.

Each sub-group will:

- Agree a remit and project plan.
- Produce intelligence and evidence on the appropriateness and effectiveness of the current support arrangements for FE and HE students split into various themes;
- Provide a forum for deeper engagement with those who are working to deliver student support advice and services;
- Identify current challenges facing a broad range of students from different backgrounds and with varying needs; and
- Influence and inform development of options for improving student support across the FE and HE sectors proposed by Review Group.

Output

Sub-group activity will be co-ordinated by the secretariat to the Review and overseen by the Independent Chair. A Project Team lead will be appointed to liaise between sub-group and the Review Group. They will engage with sub-groups, collate and share findings to brief Chair and inform papers for main Review Group ahead of meetings.

Terms of Reference

Membership

- The Chair will oversee sub-group activity. SG officials will convene and chair meetings, events and other work as necessary. There will be scope to appoint a lead member of each sub group to undertake specific tasks, as required.
- The groups will comprise membership of individuals who have an interest or role in the delivery or receipt of student support.
- The Project Team will continuously review membership of each group to ensure that it has a wide range of expertise and is inclusive.
- Members of the sub-groups can be co-opted onto the core Review Group as required where they are invited to discuss a topical issue or present information/evidence to the main group.

Secretariat

- The Review Project Team will co-ordinate the work of the sub-groups and the secretariat function will be provided by Scottish Government officials.
- Scottish Government Analytical Services will also provide analytical support, as appropriate (in partnership with SFC where necessary).

Engagement

- The work of the sub-groups will be taken forward through a range of different channels including meetings, visits to FE and HE institutions, structured conversations and presentations from experts, events such as workshops and seminars, cases studies, virtual forums and other electronic communication tools including social media.
- Communications will be issued to members electronically and gathering of information may be conducted by correspondence where that is the most appropriate method.

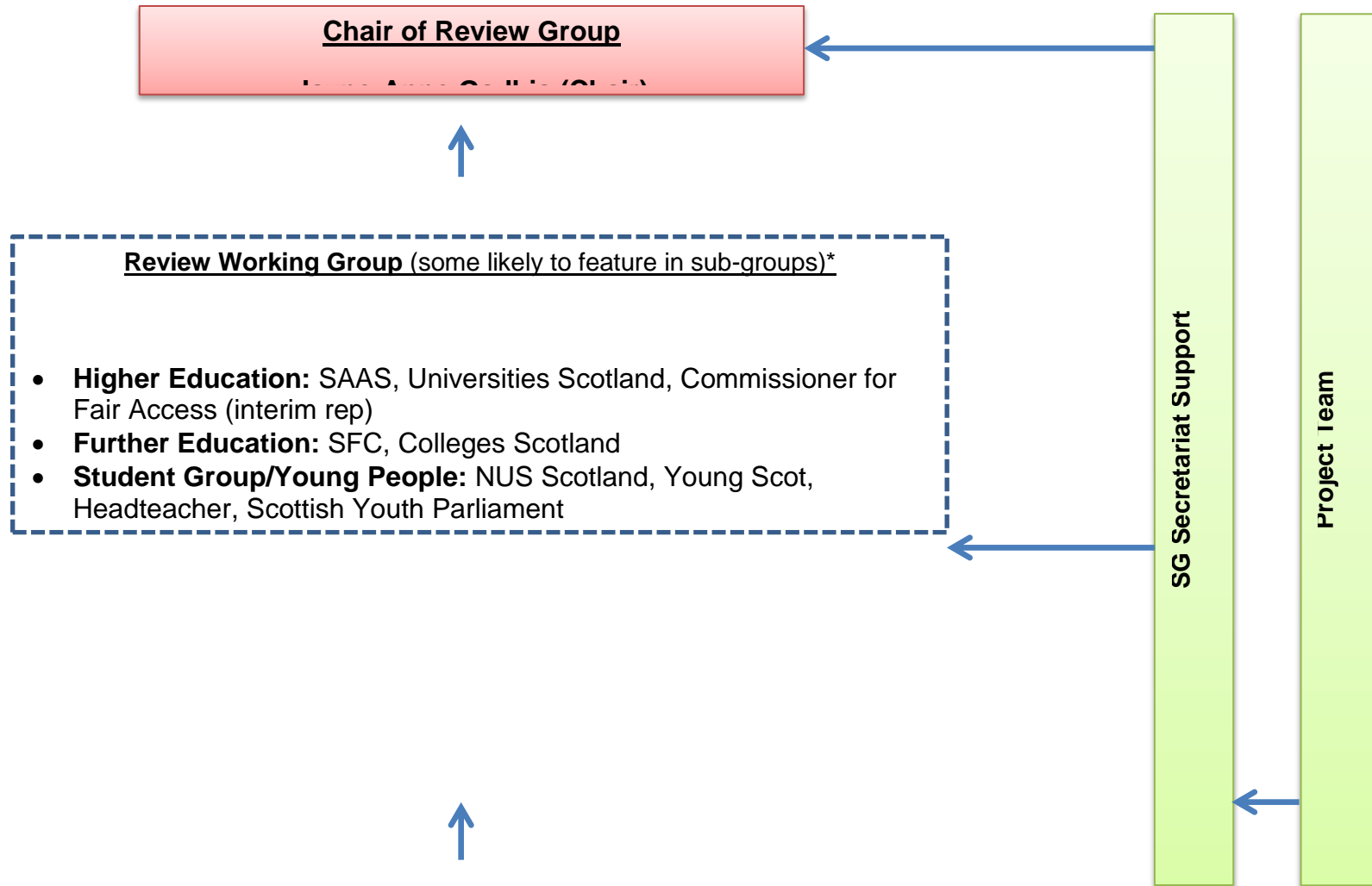
Timetable

The work of the sub-groups will progress once the Review Group has met for the first time. It is envisaged that the Project Team lead will provide a report (in writing) on the progress made by each sub-group to the main Review Group ahead of each meeting.

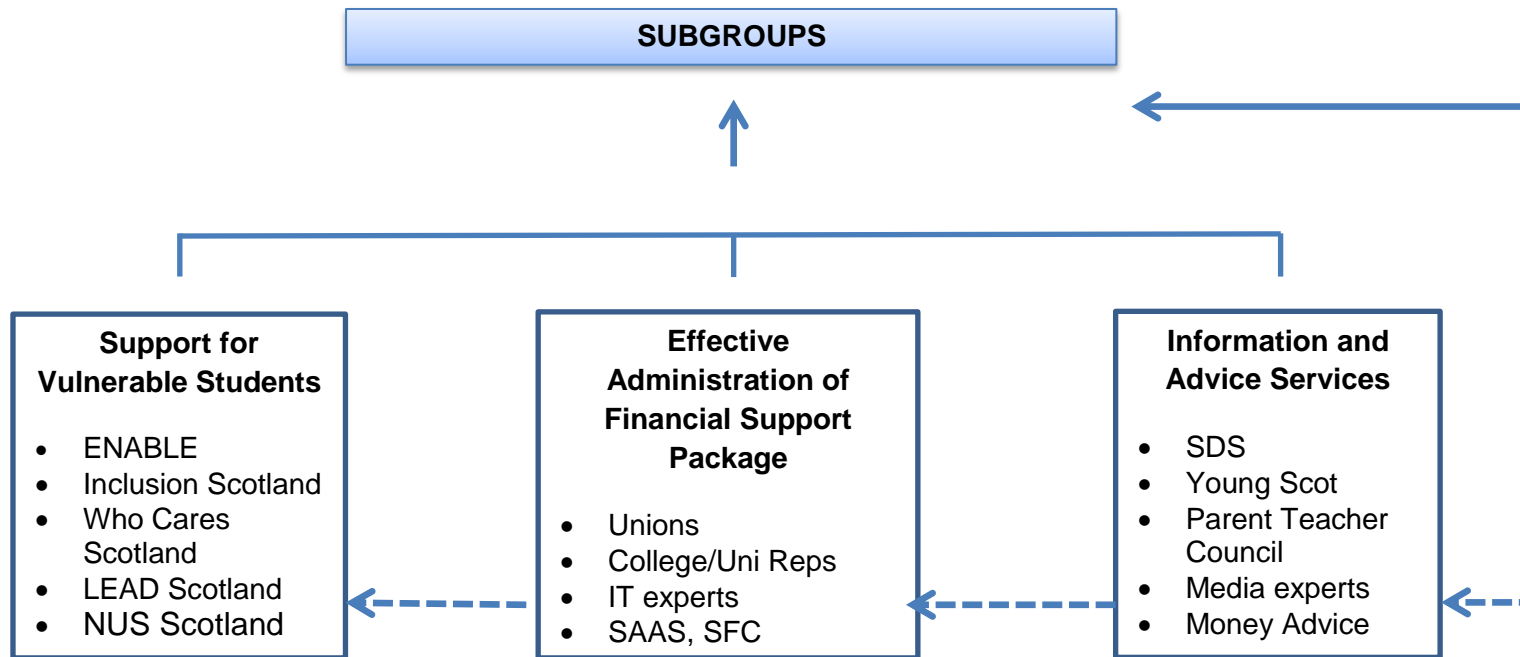
This will be taken forward in line with timetabling of themed meetings for the core Review Group.

The following table sets out a proposed timetable for sub-group activity.

| Task | Timescale |
|--|---------------------|
| Sub-group members are invited to participate | December 2016 |
| Sub-groups convenes (either face to face meeting or by correspondence) | January – June 2017 |
| Series of engagement and on-going work, including production of evidence ahead of Review Group meetings. | |



*Governance structure subject to change following first review group meeting



*Governance structure subject to change following first review group meeting

Membership of Core Review Group

| Member and Organisation | Role in this review | Interests |
|---|---|---|
| Jayne-Anne Gadhia | Chairperson leading review | All interests concerning FE and HE student support |
| Students Awards Agency Scotland (SAAS) | Provide strategic oversight of current HE student support system administered by SAAS | Student support package HE, students, universities |
| Universities Scotland | Represent interests of university and higher education sector | Higher Education Institutions |
| Scottish Funding Council (SFC) | Provide strategic oversight of current FE student support system administered by SFC and colleges | Student support package FE, students, colleges |
| Colleges Scotland | Represent interests of colleges, act as a collective voice across the sector in Scotland | Colleges, students, support package HE and FE |
| National Union of Students (NUS) Scotland | Represent student interests and support the review by providing insight and views of students in relation to the current and future support packages | Students, colleges, universities, support package HE and FE, widening access, disadvantaged students, |
| Young Scot | Support the review by drawing on their expertise of working with young people aged 11 – 26 by providing advice, services, and information to help inform future educational opportunities and careers. Also represent the interests of young scots across a wide age range. | Students, prospective students, student support package HE and FE |
| Headteachers | Support the review by drawing on their expertise of the school sector and working with children and parents. | Students, prospective students, parents, student support |

| | | |
|---|--|---|
| | | package HE and FE |
| Scottish Youth Parliament | Represents Scotland's young people. | Students, prospective students, student support package HE and FE |
| Citizens Advice (Money Advice Scotland) | Citizens Advice Scotland, helps more than 300,000 people solve their problems each year in communities everywhere from city centres to the Highlands and Islands. They work for a fairer Scotland where people are empowered and their rights respected. | Students, prospective students, , student support package HE and FE |

**Ian McLaughlan, Youth Scotland, unable to attend first meeting but officials are following up involvement in subsequent meetings*

Meeting Attendees

| Organisation | Attendee |
|---|--------------------------|
| Chair | Jayne-Anne Gadhia |
| Virgin Money | [redacted] |
| Virgin Money | [redacted] |
| Working Group members | |
| SAAS | Paul Lowe |
| Scottish Funding Council | Dr John Kemp |
| NUS Scotland | Vonnie Sandlan |
| NUS Scotland | Philip Whyte |
| Colleges Scotland | Shona Struthers |
| Universities Scotland | Alastair Sim |
| Young Scot | Louise MacDonald |
| Headteacher, Castlebay Community School | Annag MacLean |
| Scottish Youth Parliament | Erin McAuley |

| | |
|--------------------------------------|----------------------|
| Child Poverty Action Group | Angela Toal |
| Money Advice Scotland | Yvonne MacDermid OBE |
| IPPR Scotland | Russell Gunson |
| Scottish Government officials | |
| Scottish Government | [redacted] |
| Scottish Government | [redacted] |
| Scottish Government | [redacted] |
| Scottish Government | [redacted] |

[redacted]

Briefing to Minister ahead of meeting with JAG on 30/3/17 – sent 28/3/17 (some sections redacted under Sections 30(b)(i) and 30(b)(ii) – free and frank exchange of views for the purposes of deliberation and section 38(1)(b) – personal data)

Review of Student Support - Meeting with Jayne-Anne Gadhia, 30th March 2017

| | |
|------------------------------------|--|
| Date and Time of Engagement | Thursday 30 th March 13:40 – 14:40 |
| Where | Minister's Room Scottish Parliament |
| Who | Jayne-Anne Gadhia, Independent Chair of the Student Support Review and CEO of Virgin Money who will bring [redacted] who is supporting her to deliver this role. |
| Key Purpose / Message | Opportunity to restate ambitions for student support review and hear from chair about progress to date. |
| Official Support | [redacted] |
| Briefing contents | Annex A – Purpose of Meeting and Key Discussion Points Annex B - Summary of Review Work and Membership Annex C – Summary of Discussions at Workshop (20 th March) Annex D – Summary of Draft Recommendations |

Purpose of the meeting

- Provides an opportunity to thank Jayne Anne for her leadership of, and commitment to, the review, and express SG ambitions on what we hope it will deliver. **[redacted]**

Key discussion/ emphasis points

Introduction

- Welcome the opportunity to meet to hear more on progress of review, what's working well along with any challenges being faced.
- Jayne Anne appointed to role to bring fresh personal perspective and business acumen to review and grateful for time and effort that has been invested in leading the process.

Personal ambitions for review

At the outset you made clear:

- Want the review to be carried out in the wider context of government ambitions to improve the efficiency and effectiveness of learner journey and widen access to education.
- Want to see a simpler and fairer system of support that is firmly focussed on meeting the needs of all students in further and higher education, particularly the most vulnerable.

Overall operation

- Pleased with operation and management of process, brigading a wide range of views and making good progress.
- Hope JAG is being well supported by SG in her efforts to deliver recommendations within timescale.
- [redacted]

Closing

- Thanks for time and for providing update and reflections on review thus far. Keen to stay in touch.
- Provisional slot in diary to meet again on 10 May, ahead of interim findings event.

Summary of Review Work

Background and review operation

- [redacted]
- Scottish Government secretariat support team are working well day to day with key individuals from within Virgin Money [redacted] who have been identified by the chair to support her to effectively deliver for Ministers.

Meeting schedule and work programme

- The review group met for the first time on 5th December and has met face to face since then on 27th January at University of Edinburgh and again on 10th March at City of Glasgow College. In between times, the chair convened a conference call for review group members on 24th February. The next meeting of the review group will take place on 28th April at Ayrshire College, Kilmarnock Campus.
- Alongside review group meetings, 5 sub groups are in operation covering:

| | |
|---------------------------------------|--|
| Product Design | Reported to main group on 10 March. |
| Benefits and Support | Report to main group on 28 April. |
| IAG and Financial Literacy | |
| Effective administration and Delivery | |
| Finance | <p>Purpose to understand funding available and cost potential scenarios to ensure options communicated are affordable within existing budget.</p> <p>Chair keen to ensure she includes information on all existing funding to inform the financial parameters she is working within.</p> |

Half day workshop

- Separate to formal review group meetings and sub group activity, the chair convened a half-day workshop on 20 March to start to bring together the work that has been taking place at sub group level into draft recommendations for discussion (**Annex D**). A summary note of this discussion is provided at **Annex C**.

Evidence gathering

- As part of the review process, YouGov hosted a student survey on behalf of review group which gathered more than 3552 responses from students offering their perspective on the challenges they face in supporting their studies. This covered FE and HE.
- Alongside this, a series of student focus groups have taken place around Scotland (with more planned throughout the course of the review).

Interim Recommendations

- The chair has expressed an interest in delivering an event half way through the overall timetable (25 May) to signal direction of travel and test emerging recommendations with stakeholders.
- The event will present approximately 5 high level recommendations (informed by early review work) and announce a formal consultation process.
- SG secretariat will work with the chair and her team to design the event and formulate a delegate list.

Membership

- The Review Group comprises the following members:

| Organisation | Member |
|---------------------------------------|---------------------------------|
| Student Awards Agency Scotland (SAAS) | Paul Lowe |
| NUS Scotland | Vonnie Sandlan and Philip Whyte |
| Colleges Scotland | Shona Struthers |
| Young Scot | Louise MacDonald |
| Headteacher | Annag Maclean (Castlebay High) |
| Child Poverty Action Group (CPAG) | Angela Toal |
| Scottish Funding Council (SFC) | Dr John Kemp |
| Universities Scotland | Alastair Sim |
| Scottish Youth Parliament | Erin McAuley MSYP |
| IPPR Scotland | Russell Gunson |
| Money Advice Scotland (CAB) | Yvonne MacDermid OBE |
| UNISON | John Gallacher |

1. *Equal education opportunity for over 18s.*

- Review group members raised that there is not sufficient evidence to award students under 18 less than those 18 and over and that students make a decision to leave school and study at college for a variety of reasons.
- Young people under 18 at school can access EMA, like those studying FE at college, but also have access to free school meals which college students don't.
- There can be an impact on the whole family if a young person chooses to enter FE/HE given interaction with parent/guardians' access to welfare benefits. Parents are able to claim Child Benefit and Child Tax Credit for those in FE up to aged 19 but not if in HE. If young people in FE are not supported by parents they are able to claim benefits themselves. There are also Housing Benefit differences for FE/HE study.
- 17 year old studying FE at college could amass student loan debt (if given access to FE loans) in comparison to funded offer at school.
- Student support system should provide empowerment for young people and allow them to make their own informed decisions.
- Additional issues for young people under 18 who live away from home to study should be considered (e.g. rural communities moving for FE).
- Colleges are currently able to make judgement call on whether to offer EMA or bursary – very few offer bursary to under 18.
- Suggestion of standard rules across student support system with element of flexibility.
- Student experience should also be considered as part of any recommendations.

Next Steps

- Further consideration of support for this age group to be progressed by Product Design sub-group

2. *Means-tested bursaries for the lowest income backgrounds.*

- Review group agreed that bursaries should be means-tested.
- It was suggested that headline figures are provided in order to consider balance of e.g. loans v. bursaries.
- Further consideration be given to evidence that those students from the lowest incomes are leaving HE with the most debt.

Next Steps

- Finance sub-group to model costings of 4 options from Product Design paper

3. *'Employment Grants' (to replace student loans, which are structured the same as current loans) for those from/with household incomes between £tbc and £tbc).*

- Review group agreed that there is an issue with the label 'loan' but further consideration to be given to language/terminology.

- Group also agreed that FE loans should be considered as part of new system but there should be a sliding scale, i.e. those from poorest background get more access to bursary than loan.
- Loans should remain available to all students regardless of income.
- Consideration should be given to the Manifesto commitment to retain the minimum income guarantee (in HE).
- More thought required on the time for an FE student to complete their learner journey if continuing to degree level and level of debt amassed, i.e. should there be a cap on the maximum amount/years to be repaid.
- Loans should not replace the bursary offer in FE but should be considered as an additional option.
- Different repayment terms could be considered depending on income.
- The term 'grant' is misleading if referring to something which requires to be repaid.
- More work to be done on understanding of student debt in comparison to commercial debt.
- Should be mindful that under 18s are unable to obtain commercial debt.
- Should consideration be given to a fixed amount after graduation rather than loan repayment.
- Need to consider sharia compliant offer.

Next Steps

- Finance sub-group to model costings of 4 options from Product Design paper.

4. Tuition Fees only for those from higher income backgrounds (above £tbc).

- The group agreed that this group should still be entitled to access loan support if they required to do so.

Next Steps

- N/A

5. Centralised administration of both systems.

- Review group agreed on the benefits of a common system.
- Suggested that this be re-named as 'common' administration system as national and local elements will remain.
- Clear guidelines are a significant element.
- Student experience is significant in this area also and this should lead design
- Application for support could be standardised for FE and HE but the face-to-face offer of local support remains important .

Next Steps

- Effective Administration and Delivery sub-group to consider in more detail

6. Case managers in FE/HE where appropriate (from existing team of student support advisors)

- Review group agreed on the important role of support staff in all institutions.
- Consideration should be given to terminology, not sure the label is quite right.
- Student support staff should feature more prominently in students' induction to college.

- Complexities in standardising approach in FE exist due to shorter timescales in colleges for applying for support. This can result in uncertainty for FE students at early part of their course and planning difficulties in areas like childcare arrangements.

Next Steps

- Effective Administration and Delivery sub-group to consider in more detail.

7. All communicated in simple, transparent manner.

- Review group agreed on significance of this.
- Improving participation in the system and understanding.
- Greater emphasis on ensuring students are aware what they can access.
- Students are the customer in this process and should be engaged in designing any improvements.

Next Steps

- IAG and Financial Literacy sub-group to consider in more detail.

8. Interaction with the welfare benefits system.

- Review group agreed that students should not be disadvantaged by system if in receipt of benefits.
- Further consideration required on interaction with Universal Credit.
- Students shouldn't be put off study due to existing reliance on welfare benefits.
- Further consideration required on benefits interactions and entitlement v. discretionary support.

Next Steps

- Benefits and Support sub-group to consider in more detail.

[redacted]

Briefing for Minister meeting with JAG 25/5/17 – some sections redacted under Sections 30(b)(i) and 30(b)(ii) – free and frank exchange of views for the purposes of deliberation and section 38(1)(b) – personal data

Review of Student Support - Meeting with Jayne-Anne Gadhia, 25 May 2017

| | |
|---|--|
| <i>Date and Time of Engagement</i> | Thursday 25 May 2017 11:15 – 11:55 |
| <i>Where</i> | Minister's Room Scottish Parliament |
| <i>Who</i> | Jayne-Anne Gadhia, Independent Chair of the Student Support Review and [redacted] (Virgin Money employee who is supporting JA to deliver in her role as chair). |
| <i>Key Purpose / Message</i> | Opportunity to reflect on current status of the review at this halfway point and communicate SG ambitions. |
| <i>Official Support</i> | [redacted] |
| <i>Briefing contents</i> | Annex A – Background and purpose/ benefit of meeting Annex B - Summary of potential key discussion and emphasis points Annex C – Review group membership Annex D - Review group remit and role of chair |

Background and purpose of meeting

Background

[redacted]

- **The availability of additional SG resource to increase levels of student support (bursary).** A plea for the Group to explore this has been led by NUS Scotland, supported by Colleges Scotland. The Chair has sought to reinforce the clear message in the review remit (see **Annex D**) about the limitations on public finances. This same point was emphasised by the Minister at the first review meeting held last December at Forth Valley College in Alloa;
- **The desirability and format of a national/ unified system of administration for student support.** While greater consistency is viewed as desirable, concerns have been expressed by UNISON about the impact on members of an overly centralised system in which SAAS assumed responsibility for tasks currently carried out locally by college staff;
- [redacted]

Summary of Potential Key discussion/ emphasis points

Introduction

- Welcome the opportunity to meet to reflect on where review has got to at this half way point and to discuss collective ambition for review as we enter the next (critical) phase.
- [redacted]
- What are the Chair's reflections on first phase of the work and publication of a mid-term consultation paper?

Personal/ SG ambitions for review

At the outset you made clear:

- Want the review to be carried out in the wider context of government ambitions to improve the efficiency and effectiveness of learner journey and widen access to education.
- Want to see a simpler and fairer system of support that is firmly focussed on meeting the needs of all students in further and higher education, but particularly the most vulnerable (e.g. disabled students, lone parent students, those on very low incomes or from low income families) .
- [redacted]

Closing

- Thanks for time and for the effort invested in review to get us to this point. Keen to stay in touch on progress as the second phase progresses. More regular dialogue helpful as we work to autumn publication.

Membership

- The Review Group comprises the following members:

| Organisation | Member |
|---------------------------------------|---------------------------------|
| Student Awards Agency Scotland (SAAS) | Paul Lowe |
| NUS Scotland | Vonnie Sandlan and Philip Whyte |
| Colleges Scotland | Shona Struthers |
| Young Scot | Louise MacDonald |
| Headteacher | Annag Maclean (Castlebay High) |
| Child Poverty Action Group (CPAG) | Angela Toal |
| Scottish Funding Council (SFC) | Dr John Kemp |
| Universities Scotland | Alastair Sim |
| Scottish Youth Parliament | Erin McAuley MSYP |
| IPPR Scotland | Russell Gunson |
| Money Advice Scotland (CAB) | Yvonne MacDermid OBE |
| UNISON | John Gallacher |

Background and Remit

On 6 September, in setting out her Programme for Government, the First Minister announced:

“Starting in October this year and reporting by autumn 2017, we will undertake a thorough review of student support to ensure that the entire system is firmly focused on meeting the needs of students in further and higher education, particularly the most vulnerable. We want all students at university or college to benefit from a fair and effective package of appropriate support”.

The Minister for Further Education, Higher Education and Science has made clear that the focus of this wide ranging review is the award of living cost support to students, the Scottish Government (SG) policy on free tuition is not within scope. Ministers want the review to be bold and inquisitive, but also aware of the evident constraint on the public finances. It will therefore be important for the Chair – and working group members – to make connections to relevant and complementary SG policy under development, e.g. connecting to early years childcare reform could influence the need for additional support for students with childcare responsibilities.

The overall remit of the review is to assess the appropriateness and effectiveness of the various Scottish Government means of supporting students engaged in FE and HE in Scotland, and present recommendations for improvement. This will take place within the broader context of reform to the ‘Learner Journey’ (i.e. route by which students currently progress through different levels of education).

Role of Chair

The role played by the chair will be critical to delivering a successful review process and final report that contains credible recommendations for improving the current system and enhancing students journey through education. It will be necessary for the chair to provide strategic leadership and brigade a diverse range of views and interests to deliver progress within Ministers prescribed timescales. As well as allowing space for creative discussion, the Chair will be required to direct, challenge and scrutinise ideas that will ultimately inform independent, evidence based recommendations to Ministers.

Specifically the Chair will be expected to:

- Set out the scope of the review and provide parameters for discussion;
- Lead on the development of an evidence base, including where appropriate, the commissioning and publication of independent research;
- Ensure progress is made towards agreed milestones;
- Publish, by Autumn 2017, a report to Ministers outlining ways to reform student support to ensure the entire system is firmly focussed on meeting the needs of students in FE and HE, particularly the most vulnerable.

Email from SSR Project Team alerting Jayne-Anne & others to Student Support Review consultation – sent 30/7/17 (officials names & contact details redacted under section 38(1)(b) – personal data)

All,

The Student Support Review Consultation is now live on the SG website - <https://consult.scotland.gov.uk/student-support/financial-support-for-students>.

An SG Press Release is scheduled to issue at 12 noon and secretariat will action a communications plan thereafter to maximise responses.

Grateful if you can also please promote via your own networks.

Briefing to Minister ahead of meeting with JAG on 26/9/17 – sent 21/9/17 (some sections redacted under Sections 30(b)(i) and 30(b)(ii) – free and frank exchange of views for the purposes of deliberation and section 38(1)(b) – personal data)

Review of Student Support: Meeting Jayne-Anne Gadhia, 26th September 2017

| | |
|------------------------------------|--|
| Date and Time of Engagement | Tuesday 26 th September 2017 15:00 – 16:00 |
| Where | Minister’s Room Scottish Parliament |
| Who | Jayne-Anne Gadhia (JAG), Independent Chair of the Student Support Review and [redacted] (Virgin Money employee who is supporting JAG to deliver in her role as Chair). |
| Key Purpose / Message | Opportunity to reflect on Review status at this advanced point and to discuss how well progress is matching SG ambitions. This briefing presents a number of key discussion and emphasis points to be covered in the meeting. [redacted] |
| Official Support | [redacted] |
| Briefing contents | Annex A - Background and purpose of meeting Annex B - Key discussion and emphasis points Annex C – Further issues the Chair may raise |

Background and Purpose of Meeting

Background

You met with officials on 22nd August as part of a series of 'deep dive' meetings to discuss Review progress, including; JAG's emerging 'social contract model' involving a maximum student award of £8,100 per year; the prospects for advancing loans to Further Education (FE) students; Manifesto commitments on student loan repayment; [redacted].

Following that meeting, the Review Group then met on the 25th August. The next Review Group meeting will take place on 29th September. A final Review Group meeting is scheduled to take place on 3rd November, with the report launch event currently held in your diary for the morning of 23rd November. These dates are yet to be finalised.

A consultation on the Review's emerging findings and outline proposals was launched on 30th June and closed on 31st August, receiving 97 responses. The research organisation appointed by SG is currently undertaking analysis of responses with a draft to be presented at the next Review group meeting on 29th September.

[redacted]

Key Stats sent to Jayne-Anne Gadhia 24/10/17

FURTHER AND HIGHER EDUCATION STUDENT SUPPORT – KEY STATISTICS

Higher Education

To cover living costs, eligible students can access a loan and, in some cases, a bursary, via the Student Award Agency Scotland (SAAS) depending on household income. A student is defined as 'independent' if they meet any of the following criteria; over the age of 25, has supported themselves for three years, has a dependent child, has no parents, is married or is permanently estranged from their parents. If a student does not meet any of these criteria, they are classed as a 'dependant' student.

Table 1: Loan and Bursary support for full-time HE students

| Young Students (Dependent Students) | | | | Independent Students | | |
|-------------------------------------|---------|--------|---------------|----------------------|--------|---------------|
| Household Income | Bursary | Loan | Total | Bursary | Loan | Total |
| £0 to £18,999 | £1,875 | £5,750 | £7,625 | £875 | £6,750 | £7,625 |
| £19,000 to £23,999 | £1,125 | £5,750 | £6,875 | £0 | £6,750 | £6,750 |
| £24,000 to £33,999 | £500 | £5,750 | £6,250 | £0 | £6,750 | £6,250 |
| £34,000 and above | £0 | £4,750 | £4,750 | £0 | £4,750 | £4,750 |

SOURCE: SAAS

Table 2 provides enrolments by mode of study at Higher Education Institutions.

Table 2: Higher Education Institutions Enrolments in Scotland

| | 2010/11 | 2011/12 | 2012/13 | 2013/14 | 2014/15 |
|----------------------|---------|---------|---------|----------|----------------|
| Full-time | 166,350 | 167,365 | 167,065 | 170,800 | 174,840 |
| Part-time | 72,260 | 65,620 | 63,885 | 60,000 | 57,730 |
| Total | 238,610 | 232,985 | 230,950 | 230,800* | 232,570 |
| Postgraduate | 56,580 | 54,940 | 53,495 | 54,105 | 56,200 |
| Undergraduate | 182,030 | 178,045 | 177,455 | 176,695 | 176,370 |
| Total | 238,610 | 232,985 | 230,950 | 230,805 | 232,570 |

Source: <https://www.hesa.ac.uk/news/14-01-2016/sfr224-enrolments-and-qualifications> Table 1a*
 Figures do not sum due to rounding.

Table 3 shows the number of full-time HE students supported by SAAS by types of funding.

Table 3: Number of students studying HE and total cost of types of funding (Full-time only)

| | Bursaries and grants | | Fees | | Loans | | Total Support | |
|---------|----------------------|-----------|---------|-----------|---------|-----------|---------------|-----------|
| | Student | Cost (£m) | Student | Cost (£m) | Student | Cost (£m) | Student | Cost (£m) |
| 2010/11 | 68,960 | £127.7 | 126,630 | £220.8 | 79,395 | £223.3 | 133,175 | £571.9 |
| 2011/12 | 55,685 | £103.4 | 125,790 | £223 | 80,875 | £243.9 | 133,990 | £570.3 |

| | | | | | | | | |
|---------|--------|--------|---------|--------|--------|--------|---------|--------|
| 2012/13 | 54,130 | £100.6 | 127,090 | £229.5 | 81,640 | £254.3 | 135,375 | £584.3 |
| 2013/14 | 53,450 | £64.9 | 130,990 | £240.7 | 85,655 | £429.6 | 137,295 | £734.7 |
| 2014/15 | 52,315 | £63.6 | 133,460 | £249.0 | 88,985 | £468.8 | 139,370 | £781.3 |
| 2015/16 | 49,815 | £66.1 | 134,760 | £254.0 | 92,005 | £486.3 | 141,000 | £805.8 |

Source: SAAS Higher Education Student Support in Scotland 2010/11 – 2015/16

Further Education

To cover maintenance costs, eligible FE students (aged 16-19) can claim £30 per week Education Maintenance Allowance (EMA). To qualify, households with one dependent child must be earning £24,421 per year or less, and households with more than one dependent child must be earning £26,884 or less. An FE Maintenance Bursary is available for eligible students aged 18 and over, dependent upon their personal circumstances. **Table 4** outlines the FE bursary award rates.

| Table 4: Level of support available through FE Student Support | | |
|---|-------------------------|---------------------|
| Student Category | Weekly Allowance | Annual Total |
| Under 18: | | |
| Living away from home | £38.14 | £1,640 |
| Parentally Supported (18-25): | | |
| Living at home. | £75.91 | £3,264 |
| Living away from home. | £95.94 | £4,125 |
| Self-Supporting | £95.94 | £4,125 |

Table 5 provides the number of students studying both FE and HE at college.

| Table 5: Students at College in Scotland (headcount) | | | | | | |
|---|------------------|----------------|----------------|----------------|----------------|----------------|
| | | 2010/11 | 2011/12 | 2012/13 | 2013/14 | 2014/15 |
| Higher Education | Full Time | 30,945 | 31,933 | 31,172 | 31,799 | 32,325 |
| | Part Time | 18,468 | 15,360 | 15,132 | 15,437 | 15,104 |
| | Total | 48,026 | 46,345 | 45,004 | 45,652 | 46,012 |
| Further Education | Full Time | 48,681 | 48,993 | 47,157 | 48,088 | 46,946 |
| | Part Time | 222,355 | 176,800 | 161,840 | 160,233 | 159,867 |
| | Total | 264,515 | 217,511 | 199,542 | 199,025 | 191,581 |
| Total (HE&FE) | | 305,969 | 257,913 | 238,805 | 238,399 | 226,919 |
| <i>Source: SFC data</i> | | | | | | |

Table 6 outlines the total funding for FE student support.

Table 6 - FE Student Support Funding

| | FE student support (£m) | Bursary (£m) | Childcare (£m) | Discretionary (£m) |
|----------------|-------------------------|--------------|----------------|--------------------|
| 2010/11 | £83.8 | 69.0 | 14.9* | |
| 2011/12 | £95.5 | 78.7 | 9.8 | 7.1 |
| 2012/13 | £99.5 | 78.7 | 13.7 | 7.1 |
| 2013/14 | £102.8 | 81.3 | 14.3 | 7.3 |
| 2014/15 | £104.0 | 82.3 | 14.5 | 7.3 |
| 2015/16 | £105.3 | 84.0 | 14.3 | 7.0 |
| 2016/17 | £106.2 | 84.9 | 14.3 | 7.0 |

*Source: SFC. * Published childcare and discretionary funding figures for 2010/11 are not disaggregated.*

Table 7 is the total enrolments receiving FE student support.

Table 7: Further Education enrolments receiving student support

| | |
|---------|---------------|
| 2009/10 | 48,039 |
| 2011/12 | 43,820 |
| 2012/13 | 45,698 |
| 2013/14 | 45,357 |
| 2014/15 | 43,779 |

Source: FES

Letter from Minister to Jayne-Anne regarding launch event sent 16/11/1

Ministear airson Foghlam Leantainneach, Foghlam Àrd-
ìre agus Saidheans
Minister for Further Education, Higher Education and
Science

Shirley-Anne Somerville BPA/MSP



Scottish Government
Riaghaltas na h-Alba
gov.scot

F/T: 0300 244 4000
E: scottish.ministers@gov.scot

Jayne-Anne Gadhia CBE
Virgin Money
28 St Andrew Square
Edinburgh
EH12 1AF

16 November 2017

Dear Jayne-Anne,

May I first of all thank you once again for leading and delivering this important review into student support in Scotland. Unfortunately, I am unable to attend the launch event on 20th November due to constituency obligations.

I agree entirely with what you say in your report about education having the power to transform lives. Our students can help mould Scotland's future society and economy – and they should be supported as such to ensure that they reach their full potential.

I was pleased that the Review focussed, rightly, on the views of students with over 3,500 responses received to the student survey and focus groups taking place throughout Scotland. I am grateful for the efforts of both you and your team to visit a number of locations in Scotland to offer a wide range of students with the opportunity to share their views.

The Scottish Government will now need to consider implementation of the recommendations in your report. In some cases, legislation would be required to put a number of the recommendations in place. Further work will be required on complex matters such as the interaction between the student support systems and welfare benefits as this is a reserved matter governed by the Westminster Government. We will however, consider this and all recommendations contained in the final report very carefully.

We will confirm our implementation plans to deliver beneficial change for Scotland's students in due course. All recommendations related to funding, including any recommendation to increase bursary funding, will be considered as part of the Budget process.

Taigh Naomh Anndrais, Rathad Regent, Dùn Èideann EH1 3DG
St Andrew's House, Regent Road, Edinburgh EH1 3DG
www.gov.scot



Finally, I would like to invite you to meet with me to follow up on any issues that arose from your work that may be key to the implementation phase.

I want to thank you once again Jayne-Anne and also to your Review Group members for dedicating time and energy into the successful delivery of this significant report.



SHIRLEY-ANNE SOMERVILLE

Letter from Jayne-Anne Gadhia to the Minister regarding launch event sent 17/11/17



Virgin Money plc
28 St Andrew Square
Edinburgh
EH2 1AF

virginmoney.com

Shirley-Anne Somerville MSP
Scottish Government
St Andrew's House
Regent Road
Edinburgh
EH1 3DG

17th November 2017

Dear Shirley-Anne,

Thank you for your letter dated 16 November 2017.

I am sorry that you will not be able to join us at the launch event on Monday but I appreciate your positive comments about our Report and will pass on your thanks to the Review Board.

I know I speak for my team when I say that we have all found this a challenging, illuminating and meaningful project. I am very pleased with the outcome in the form of the final Report but also with the consensus that we managed to achieve across a very diverse Board.

Thank you for confirming that you will consider the Report and all our recommendations very carefully. I should be delighted to meet with you to discuss the key issues that may be relevant to the implementation phase. I will ask my office to liaise with your office to arrange a suitable time.

In the meantime, I am pleased to enclose a copy of the final report ahead of its publication on Monday 20th November 2017.

Finally, I would like to thank you for appointing me to lead this Review. It was a great privilege to meet so many students with a passion for learning and I hope that our recommendations will make funding more accessible for all those who want to go into further and higher education in Scotland.

Yours sincerely,

A handwritten signature in black ink that reads "Jayne-Anne". The signature is stylized with a large loop at the beginning and a horizontal line at the end.

Jayne-Anne Gadhia
Chief Executive Officer
Virgin Money

Itinerary of meetings and calls between Shirley-Anne Somerville and Jayne-Anne Gadhia

- 5th December 2016, 09:30 – 10:00, Forth Valley College, Alloa Campus, Devon Road, Alloa FK10 1PX
Private meeting between the Minister and Jayne-Anne ahead of first meeting of Student Support Review Board
- 30th March 2017, 13:40 – 14:40, Scottish Parliament
Meeting between the Minister and Jayne-Anne to discuss progress on the Review
- 8th May 2017, 16:00 – 16:30
Phone call between the Minister and Jayne-Anne to discuss progress on the Review
- 25th May 2017, 11:15 – 11:55, Scottish Parliament
Meeting between the Minister and Jayne-Anne to discuss progress on the Review
- 27th June 2017, 16:45 – 17:30, Scottish Parliament
Meeting between the Minister and Jayne-Anne to discuss progress on the Review
- 26th September 2017, 15:00 – 16:00, Scottish Parliament
Meeting between the Minister and Jayne-Anne to discuss progress on the Review
- 8th November 2017, 13:15 – 13:45
Phone call between the Minister and Jayne-Anne ahead of Review launch

REASONS FOR NOT PROVIDING INFORMATION

Exemptions under section(s) 30(b)(i) and 30(b)(ii) of FOISA (free and frank advice and exchange of views) applies to some of the information you have requested.

These exemptions apply because disclosure would, or would be likely to, inhibit substantially the free and frank provision of advice and exchange of views for the purposes of deliberation. The exemptions recognise the need for Ministers to have a private space within which to seek advice and views from officials before reaching the settled public position which will be given in whatever final lines to take are used. Disclosing the content of free and frank briefing material on some of the Minister's meetings with Jayne-Anne Gadhia in her role as Independent Chair of the Student Support Review will substantially inhibit such briefing in the future, particularly because considerations on the Review's recommendations are ongoing and final decisions have not been taken.

These exemptions are subject to the 'public interest test'. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemptions. We have found that, on balance, the public interest lies in favour of upholding the exemptions. We recognise that there is a public interest in disclosing information as part of open, transparent and accountable government, and to inform public debate. However, there is a greater public interest in allowing a private space within which officials can provide free and frank advice and views to Ministers in briefing for lines to take during meetings. It is clearly in the public interest that Ministers can properly answer Parliamentary questions, provide sound information to Parliament (to which they are accountable), and robustly defend the Government's policies and decisions. They need full and candid advice from officials to enable them to do so. Premature disclosure of this type of information could lead to a reduction in the comprehensiveness and frankness of such advice and views in the future, which would not be in the public interest.

An exemption under section 38(1)(b) of FOISA (personal information) applies to a small amount of the information requested because it is personal data of a third party, ie supporting officials from the Scottish Government and other organisations, and disclosing it would contravene the data protection principles in Schedule 1 to the Data Protection Act 1998. This exemption is not subject to the 'public interest test', so we are not required to consider if the public interest in disclosing the information outweighs the public interest in applying the exemption.